

AGREEMENT NO. 2025-137
COLLIN COUNTY
PROFESSIONAL SERVICES AGREEMENT FOR
ELEVATOR AND ESCALATOR VERTICAL
TRANSPORTATION CONSULTING

THIS AGREEMENT by the authority of Commissioners Court as provided under Government Code, Chapter 2254, PROFESSIONAL AND CONSULTING SERVICES, is entered into by and between Provider, ATIS Elevator Inspections, LLC herein referred to as "Provider," and Collin County, Texas.

ORDER OF PRECEDENCE OF DOCUMENTS. Any inconsistency in this contract shall be resolved by giving precedence in the following order:

1. The provisions of this RFQ including all Addenda and the County's responses to the questions (attached as Exhibit A)
2. Agreement No. 2025-137
3. Provider's submitted response to the RFQ (attached as Exhibit B)
4. Provider's proposed scope of work for various projects as requested and provided as needed by the department and as outlined below in STATEMENT OF WORK

STATEMENT OF WORK:

Provider is to provide elevator services for a pool of projects for the reconditioning of various elevators listed in RFQ 2025-137 (attached as part of Exhibit A) and to work with Facilities management to define priority and assessments of selected elevators/escalators for refurbishment. Assessments include Professional opinion from Provider and Facilities based on age, criticality of equipment, cost of refurbishment and basic scope. When priority is defined the selected quantity of equipment will have assessments reports, budget costs for refurbishment and further consultant costs based on scope of work defined below.

Any added scope beyond these initial assessments will need to Commissioners Court approval. Upon Commissioners Court approval the work outlined below will be required to prepare for bid packages and management of projects. This will be a stepped approach to modernization of most escalators and elevators based on need and budgets allowed by Commissioners Court

SCOPE OF WORK

The Provider is expected to furnish consulting services that comply with the following specifications and standards:

1. Industry Standards: All consulting services must adhere to the latest editions of the following standards:
 - American National Standards Institute (ANSI) A17.1 - Safety Code for Elevators and Escalators
 - National Fire Protection Association (NFPA) 70 - National Electrical Code
 - Occupational Safety and Health Administration (OSHA) regulations related to elevator operation and maintenance
 - International Building Code (IBC) as it pertains to elevators and escalators
 - ADA Accessibility Guidelines (ADAAG) for elevator design and maintenance
2. Scope of Services: The consulting services should include but not be limited to:
 - Performing thorough inspections of existing elevators and escalators to assess condition and compliance.
 - Identifying potential safety hazards and recommending corrective actions.
 - Evaluating the performance and efficiency of current elevator systems.
 - Assisting in the formulation of maintenance plans based on inspection results.
 - Providing recommendations for upgrades or replacements where necessary.
 - Offering training and guidance for on-site personnel regarding elevator safety procedures.
 - Documenting all findings and recommendations in a comprehensive report that includes but is not limited to: Cost per Elevator/Escalator modernization packages, Budget Cost for modernization of each elevator/escalator
 - Provide drawings
 - Assist with Bid Documents and Scope of Work modernization
 - Timeliness: Services must be initiated within 30 days of contract award, with written deliverables provided as outlined in the delivery requirements.

Service Requirements

The selected contractor must ensure the following service requirements are met:

1. Consultation Meetings:
 - Initial kick-off meeting to discuss project scope and expectations.
 - Regular update meetings (at least bi-weekly) to report on progress and findings.
 - Final presentation of the inspection report and recommendations to Collin County stakeholders.

2. Inspection Procedures:
 - o Conduct on-site inspections of all elevators and escalators.
 - o Utilize appropriate testing equipment and methods to diagnose issues.
 - o Assess compliance with the relevant safety and building codes.
3. Reporting Responsibilities:
 - i. Overview of inspection findings
 - ii. Identified deficiencies and safety issues
 - iii. Prioritized recommendations for remediation
 - iv. Suggested maintenance schedules
 - v. Cost estimates for repairs or upgrades
 - vi. Prepare and submit a detailed final report that includes:
 - a. The overall condition and plan of modernizing of all county elevators and escalators.
 - vii. Provide electronic and physical copies of the final report to Collin County.
1. Communication:
 - o Assign a primary point of contact for communication related to the project.

Jay Sitzmann at jsitzmann@atis.com 314-396-7894
 - o Respond to requests for information or clarification within 48 hours.

Delivery Requirements

The Provider must meet the following delivery requirements:

1. Service Commencement: The work should commence no later than 30 days from the issuance of a purchase order.
2. Inspection Timeline: Inspections of all elevator systems must be completed within 60 days of project initiation.
3. Deliverable Submission:
 - o The preliminary findings report is to be submitted within 2 weeks following the completion of inspections.
 - o The final comprehensive report, including all recommendations and discussions, to be submitted within 30 days after the preliminary report.
4. Format for Reports: All reports must be delivered as follows:
 - o Final reports must be provided in PDF and Word format.
 - o Any visual materials (charts, graphs, etc.) should be clearly labeled and included within the report.

AWARD AND COMPENSATION FOR SERVICES: Provider will invoice the County Two Hundred and seventy-five dollars per hour as provided in Exhibit C for the amount of provided services as described above by invoices to include all information as described below. No other expense or reimbursement shall be borne by Collin County unless stated herein.

- **INVOICES** along with a statement of work indicating the task completed shall be submitted monthly to appropriate department contact and address
- **PAYMENT** will be made in accordance with Government Code, Title 10, Subtitle F, Chapter 2251.
- **SALES TAX:** Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax.

TERM OF AGREEMENT: This agreement will begin upon final execution of this contract, and will remain in effect for a period of 1 year, with an option to renew for 3 annual renewals. This agreement may be terminated by either party with a thirty (30) calendar day written notice prior to any cancellation which must state therein the reasons for such cancellation. Collin County reserves the right to terminate the agreement immediately in the event the provider fails to perform in accordance with terms and conditions of the agreement as stated herein.

INDEMNIFICATION: Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees from all suits, actions, or other claims of any character, name and description brought for or on account of any injury to or damages received or sustained by any person, persons, or property on account of any negligent act or fault in performance under this Agreement. Provider shall pay any judgment with cost, which may be obtained against Collin County growing out of such injury or damages.

ASSIGNMENT: The Provider shall not assign, sell, transfer, or convey this agreement, in whole or in part, without the prior written consent from Collin County.

FORCE MAJEURE: No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement, when and to the extent such failure

or delay is caused by or results from acts beyond the affected party's reasonable control, including, without limitation: acts of God; flood, fire or explosion; war, invasion, riot or other civil unrest; actions, embargoes or blockades in effect on or after the date of this Agreement; or national or regional emergency (each of the foregoing, a "Force Majeure Event"). A party whose performance is affected by a Force Majeure Event shall give notice to the other party, stating the period of time the occurrence is expected to continue and shall use diligent efforts to end the failure or delay and minimize the effects of such Force Majeure Event.

SEVERABILITY: If any term or provision of this Agreement is invalid, illegal, or unenforceable in any jurisdiction, such invalidity, illegality, or unenforceability shall not affect any other term or provision of this Agreement or invalidate or render unenforceable such term or provision in any other jurisdiction. Upon such determination that any term or other provision is invalid, illegal, or unenforceable, the parties hereto shall negotiate in good faith to modify this Agreement so as to effect the original intent of the parties as closely as possible in a mutually acceptable manner in order that the transactions contemplated hereby be consummated as originally contemplated to the greatest extent possible.

VENUE: This Agreement will be governed and construed according to the laws of the State of Texas. This Agreement is performable in Collin County, Texas.

NOTICES:

Unless instructed otherwise in writing, Provider agrees that all notices or communications to the County permitted or required under this Agreement shall be addressed to the County at the following addresses:

Owner:

Director of Facilities
4600 Community Ave
McKinney, TX 75071

Collin County Administrator
2300 Bloomdale #4192
McKinney, TX 75071

Collin County Purchasing
2300 Bloomdale # 3160
McKinney, TX 75071

County agrees that all notices or communications to Provider permitted or required under this Agreement shall be addressed to Provider at the following address:

ATIS Elevator Inspections, LLC
600 Emerson Road
Suite 225
Saint Louis, MO 63141

All notices or communications required to be given in writing by one party or the other shall be considered as having been given to the date such notice or communication is posted by the sending party.

Contact Rick Monk at rmonk@co.collin.tx.us 972-547-5331

CHANGE ORDERS: No oral statement of any person shall modify or otherwise change, or affect the terms and conditions stated in this Agreement. All Change Orders to this Agreement will be made in writing by the Collin County Purchasing Agent.

AUDITS AND RECORDS: The Provider agrees that at any time during normal business hours, and as often as County may deem necessary, Provider shall make available to representatives of the County for examination all of its records with respect to all matters covered by this Agreement, and will permit such representatives of the County to audit, examine, copy and make excerpts or transcripts from such records, and to make audits of all contracts, invoices, materials, payrolls, records of personnel, conditions of employment and other data relating to all matters covered by this Agreement, all for a period of three (3) years from the date of final settlement of this Agreement or of such other or longer period, if any, as may be required by applicable statute or other lawful requirements.

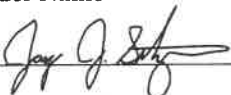
CONFLICT OF INTEREST: No public official shall have interest in this Agreement, in accordance with Government Code Title 5, Subtitled C, Chapter 171.

LIABILITY INSURANCE: Provider agrees to meet all insurance requirements as set forth in Exhibit A, Section 4, which is attached hereto and thereby made part of this Agreement.

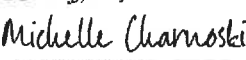
COMPLETE CONTRACT. This Agreement, including the exhibits hereto numbered "A" through "C" constitute the entire agreement by and between the parties regarding the subject matter hereof and supersedes all prior written or oral understandings. This Agreement may only be amended, supplemented, modified, or canceled by a duly executed written instrument, signed by the County and the Provider.

Warranties contained in this Agreement are in addition to and not in lieu of, any and all other liability imposed upon the Provider by law with respect to the Provider's duties, obligations, and performance hereunder. The Provider's liability hereunder. The Provider's liability hereunder shall survive the County's final acceptance and payment for the Project. All representations and warranties set forth in this Agreement, including without limitation, this paragraph, shall survive the final completion of the Work or earlier termination of this Agreement. The Provider acknowledges that the County is relying upon the Provider's skill and experience in performing the services pursuant to this Agreement.

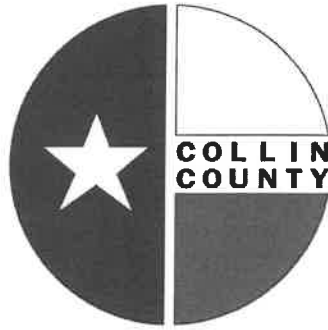
Provider Name

By: 
Title: Jay Sitzmann, Sales Executive
Date: 6/9/2025

Collin County, Texas

By: 
8195959E82F645E...
Title: Purchasing Agent
Date: 6/25/2025

Court Order No: 2025-603-06-23



Collin County, TX

REQUEST FOR QUALIFICATION

2025-137

ELEVATOR AND ESCALATOR VERTICAL TRANSPORTATION CONSULTING

RELEASE DATE: March 25, 2025

RESPONSE DEADLINE: April 24, 2025, 2:00 pm

Please refer to the project timeline in this document for all important deadlines.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

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8. QUALIFICATIONS SUBMITTAL AND VENDOR RESPONSE

Attachments:

A - LEGAL_NOTICE_TEMPLATE-2025-137 v3

B - CIQ Form

C - W9

D - Elevator/Escalator/Chairlift Information 8-21-2024

E - Sample_-_Professional_Services_Agreement_2024-137v3

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

1. INTRODUCTION

1.1. SUMMARY

This Scope of Work (SOW) outlines the necessary requirements and expectations for the procurement of elevator consulting services for Collin County, Texas. This solicitation seeks a general contract with qualified firms capable of providing preliminary consulting services related to the assessment, inspection, and maintenance of existing elevators and escalators. The selected firm will provide expert analysis and recommendations to ensure the safety, efficiency, and compliance of our elevator systems with applicable regulations, standards, and best practices.

The resulting Professional Services Agreement will be for a term of one (1) year, to begin upon award, with three (3) additional annual renewal options.

The response will be in the form of a "Statement of Qualifications" (SOQ).

1.2. BACKGROUND

The County seeks to ensure safe, efficient, and compliant vertical transportation systems on all County properties. The life cycle of most of these systems are at the point where they need to be reconditioned, and many of them have parts that are either scarce or unavailable, which leads to major downtimes in County buildings. The County is seeking a consultant to provide expertise in design, construction, maintenance, modernization, and code compliance, to help the County make informed decisions and to manage costs.

1.3. TIMELINE

Release Project Date:	March 25, 2025
Question Submission Deadline:	April 3, 2025, 2:00pm
Response Submission Deadline:	April 24, 2025, 2:00pm

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

2. GENERAL INFORMATION & REQUIREMENT

2.1. PUBLIC INFORMATION

All information, documentation, and other materials submitted in response to this solicitation are considered non-confidential and/or non-proprietary and are subject to public disclosure under the Texas Public Information Act (*Texas Government Code*, Chapter 552.001, *et seq.*) after a contract is awarded. The Owner strictly complies with all statutes, court decisions, and opinions of the Texas Attorney General with respect to disclosure of RFQ information.

2.2. TYPE OF CONTRACT

Any contract resulting from this solicitation will be in the form of the Professional Services to provide analysis of elevators for reconditioning .

2.3. EVALUATION OF QUALIFICATIONS

The evaluation of the Qualifications shall be based on the requirements described in this RFQ. All properly submitted Qualifications will be reviewed, evaluated, and ranked by the Owner. Qualifications shall not include any information regarding respondent's fees, pricing, or other compensation.

2.4. OWNER'S RESERVATION OF RIGHTS

The Owner may evaluate the Qualifications based on the anticipated completion of all or any portion of the Project. The Owner reserves the right to divide the Project into multiple parts, to reject any and all Qualifications and re-solicit for new Qualifications, or to reject any and all proposals and temporarily or permanently abandon the Project. Owner makes no representations, written or oral, that it will enter into any form of agreement with any respondent to this RFQ for any project and no such representation is intended or should be construed by the issuance of this RFQ.

2.5. ACCEPTANCE OF EVALUATION METHODOLOGY

By submitting its Qualifications in response to this RFQ, the respondent accepts the evaluation process and acknowledges and accepts that the determination of the "most qualified" firm(s) will require subjective judgments by the Owner.

2.6. NO REIMBURSEMENT FOR COSTS

Respondent acknowledges and accepts that any costs incurred from the respondent's participation in this RFQ shall be at the sole risk and responsibility of the respondent.

2.7. PREPARATION OF QUALIFICATIONS STATEMENT

Qualifications shall be prepared SIMPLY AND ECONOMICALLY, providing a straightforward, CONCISE description of the respondent's ability to meet the requirements of this RFQ. Emphasis shall be on the

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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QUALITY, completeness, clarity of content, responsiveness to the requirements, and an understanding of Owner's needs.

2.8. CONDITIONAL CLAUSES

Qualifications that are qualified with conditional clauses, alterations, items not called for in the RFQ documents, or irregularities of any kind are subject to rejection by the Owner, at its option.

2.9. COMPLETION OF RESPONSE

Respondents shall carefully read the information contained in this RFQ and submit a complete response to all requirements and questions as directed. Incomplete qualifications will be considered non-responsive and subject to rejection.

2.10. FAILURE TO COMPLY

Failure to comply with all requirements contained in this Request for Qualifications may result in the rejection of the Qualifications.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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3. SCOPE OF SERVICES

3.1. Scope of Services

Collin County is seeking consulting firms qualified to provide elevator services for a pool of projects for the reconditioning of various elevators listed in this RFQ and to work with Facilities management to define priority and assessments of selected elevators/escalators for refurbishment. Assessments include Professional opinion from consultant and facilities based on age, criticality of equipment, cost of refurbishment and basic scope. When priority is defined the selected quantity of equipment will have assessments reports, budget costs for refurbishment and further consultant costs based on scope of work defined below.

Any added scope beyond these initial assessments will need to Commissioners Court approval. Upon Commissioners Court approval the work outlined below will be required to prepare for bid packages and management of projects. This will be a stepped approach to modernization of most escalators and elevators based on need and budgets allowed by Commissioners Court

Requirements:

Detailed Specifications

The vendor is expected to provide consulting services that comply with the following specifications and standards:

1. Industry Standards: All consulting services must adhere to the latest editions of the following standards:
 - American National Standards Institute (ANSI) A17.1 - Safety Code for Elevators and Escalators
 - National Fire Protection Association (NFPA) 70 - National Electrical Code
 - Occupational Safety and Health Administration (OSHA) regulations related to elevator operation and maintenance
 - International Building Code (IBC) as it pertains to elevators and escalators
 - ADA Accessibility Guidelines (ADAAG) for elevator design and maintenance
2. Qualifications:
 - The firm must possess the following qualifications:
 - Licensed and insured in the State of Texas for elevator consulting.
 - Access to certified elevator inspectors and engineers.
 - Certified with NAESA QEI
 - Registered with TDLR

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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Title: Elevator and Escalator Vertical Transportation Consulting

- The firm shall possess the following qualifications:
 - At least 5 years of experience in elevator and escalator consulting.
 - Proof of successfully completed projects of similar scope.

3. Scope of Services: The consulting services should include but not be limited to:

- Performing thorough inspections of existing elevators and escalators to assess condition and compliance.
- Identifying potential safety hazards and recommending corrective actions.
- Evaluating the performance and efficiency of current elevator systems.
- Assisting in the formulation of maintenance plans based on inspection results.
- Providing recommendations for upgrades or replacements where necessary.
- Offering training and guidance for on-site personnel regarding elevator safety procedures.
- Documenting all findings and recommendations in a comprehensive report that includes but is not limited to: Cost per Elevator/Escalator modernization packages, Budget Cost for modernization of each elevator/escalator
- Provide drawings
- Assist with Bid Documents and Scope of Work modernization
- Timeliness: Services must be initiated within 30 days of contract award, with written deliverables provided as outlined in the delivery requirements.

Service Requirements

The selected contractor must ensure the following service requirements are met:

1. Consultation Meetings:

- Initial kick-off meeting to discuss project scope and expectations.
- Regular update meetings (at least bi-weekly) to report on progress and findings.
- Final presentation of the inspection report and recommendations to Collin County stakeholders.

2. Inspection Procedures:

- Conduct on-site inspections of all elevators and escalators.
- Utilize appropriate testing equipment and methods to diagnose issues.
- Assess compliance with the relevant safety and building codes.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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Title: Elevator and Escalator Vertical Transportation Consulting

3. Reporting Responsibilities:

1. Overview of inspection findings
2. Identified deficiencies and safety issues
3. Prioritized recommendations for remediation
4. Suggested maintenance schedules
5. Cost estimates for repairs or upgrades
6. Prepare and submit a detailed final report that includes:
 1. The overall condition and plan of modernizing of all county elevators and escalators.
7. Provide electronic and physical copies of the final report to Collin County.

1. Communication:

- Assign a primary point of contact for communication related to the project.
- Respond to requests for information or clarification within 48 hours.

Delivery Requirements

The contractor must meet the following delivery requirements:

1. **Service Commencement:** The work should commence no later than 30 days from the issuance of a purchase order.
2. **Inspection Timeline:** Inspections of all elevator systems must be completed within 60 days of project initiation.
3. **Deliverable Submission:**
 - The preliminary findings report is to be submitted within 2 weeks following the completion of inspections.
 - The final comprehensive report, including all recommendations and discussions, to be submitted within 30 days after the preliminary report.
4. **Format for Reports:** All reports must be delivered as follows:
 - Final reports must be provided in PDF and Word format.
 - Any visual materials (charts, graphs, etc.) should be clearly labeled and included within the report.

Conclusion

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

This Scope of Work articulates the necessary elements for the procurement of elevator consulting services for Collin County, TX. Interested firms must demonstrate a clear understanding of the required standards, service commitments, and deliverable timelines as outlined in this document. The successful firm will play an essential role in ensuring the optimal safety and functionality of our elevator systems thus enhancing service delivery across County facilities.

Third Party non-proprietary controls/electronics are preferred

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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Title: Elevator and Escalator Vertical Transportation Consulting

4. INSURANCE REQUIREMENTS

1. Before commencing work, the vendor shall be required, at its own expense, to furnish the Collin County Purchasing Agent with certified copies of all insurance certificate(s) indicating the coverage to remain in force throughout the term of this contract.

1. **Commercial General Liability** insurance including but not limited to the coverage indicated below. Coverage shall not exclude or limit Products/Completed Operations, Contractual Liability, or Cross Liability. Coverage must be written on occurrence form.

Each Occurrence	\$1,000,000
Personal Injury & Adv Injury	\$1,000,000
Products/Completed Operation Aggregate	\$2,000,000
General Aggregate	\$2,000,000

2. **Workers Compensation** insurance as required by the laws of Texas, and Employers' Liability.

Employers Liability	
Liability, Each Accident	\$500,000
Disease - Each Employee	\$500,000
Disease - Policy Limit	\$500,000

- iii. **Commercial Automobile Liability** insurance which includes any automobile (owned, non-owned, and hired vehicles) used in connection with the contract.

Combined Single Limit - Each Accident	\$1,000,000
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- iv. **Professional/Errors & Omissions Liability** insurance with a two (2) year extended reporting period. If you choose to have project coverage endorsed onto your base policy, this would be acceptable.

Each Occurrence/Aggregate	\$1,000,000
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- v. **Umbrella/Excess Liability** insurance

Each Occurrence/Aggregate	1,000,000
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2. With reference to the foregoing insurance requirement, the vendor shall endorse applicable insurance policies as follows:
 - i. A waiver of subrogation in favor of Collin County, its officials, employees, volunteers and officers shall be provided for General Liability, Commercial Automobile Liability, and Workers' Compensation.
 - ii. The vendor's insurance coverage shall name Collin County as additional insured under the General Liability policy.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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- iii. All insurance policies shall be endorsed to require the insurer to immediately notify Collin County of any decrease in the insurance coverage limits.
 - iv. All insurance policies shall be endorsed to the effect that Collin County will receive at least thirty (30) days notice prior to cancellation, non-renewal or termination of the policy.
 - v. All copies of Certificates of Insurance shall reference the project/contract number.
3. All insurance shall be purchased from an insurance company that meets the following requirements:
- i. A financial rating of A-VII or higher as assigned by the BEST Rating Company or equivalent.
4. Certificates of Insurance shall be prepared and executed by the insurance company or its authorized agent, and shall contain provisions representing and warranting the following:
- i. Sets forth all endorsements and insurance coverages according to requirements and instructions contained herein.
 - ii. Sets forth the notice of cancellation or termination to Collin County.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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5. EVALUATION OF PROFESSIONAL QUALIFICATIONS

The evaluation of professional qualifications of the Proposers will be based on the following criteria:

No.	Evaluation Criteria	Scoring Method	Weight (Points)
1.	Statement of Qualifications and Ability to Undertake The Project – Proposed Personnel	Points Based	30 <i>(30% of Total)</i>
2.	Prime Firm's Ability to Provide Services	Points Based	30 <i>(30% of Total)</i>
3.	Respondent's Performance on Past Representative Projects	Points Based	10 <i>(10% of Total)</i>
4.	Respondent's Knowledge of Best Practices	Points Based	10 <i>(10% of Total)</i>
5.	Respondent's Ability to Identify and Resolve Problems on Past Projects	Points Based	10 <i>(10% of Total)</i>
6.	Respondent's Proposal Format	Points Based	10 <i>(10% of Total)</i>

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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6. GENERAL INSTRUCTIONS

6.1. DEFINITIONS

1. Offeror: refers to submitter.
2. Provider: refers to a Successful Service Provider.
3. Statement: refers to those documents required to be submitted to Collin County, by an Offeror.
4. SOQ: refers to Statement of Qualifications
5. RFQ: refers to Request for Qualifications

6.2. GENERAL INSTRUCTIONS

1. If Offeror does not wish to submit a Statement at this time, please submit a No Offer response.
2. Awards shall be made not more than ninety (90) days after the time set for opening of submittals.
3. Collin County is always conscious and extremely appreciative of your time and effort in preparing your Statement.
4. Collin County exclusively uses the OpenGov eProcurement Portal for the notification and dissemination of all solicitations. The receipt of solicitations through any other company may result in the receipt of incomplete specifications and/or addenda which could ultimately render your Statement non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other company.
5. A Statement may not be withdrawn or canceled by the Offeror prior to the ninety-first (91st) day following the public opening of submittals and only prior to award.
6. It is understood that Collin County, Texas reserves the right to accept or reject any and/or all Statements for any or all services covered in a SOQ and to waive informalities or defects in Statements or to accept such Statements as it shall deem to be in the best interest of Collin County.
7. Statements submitted via email, oral, telegraphic or telephonic will not be accepted. SOQs may be submitted in electronic format via Collin County eProcurement.
8. All SOQs submitted electronically via Collin County eProcurement Portal shall remain locked until the official date and time of opening as stated in the Special Terms and Conditions of the RFQ.
9. SOQs received in the Collin County Purchasing Department after the submission deadline shall be considered void and unacceptable. Absolutely no late submittals will be considered. Collin County accepts no responsibility for technical difficulties related to electronic submittals.
10. Statements cannot be altered or amended after the submission deadline.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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11. Collin County is by statute exempt from the State Sales Tax and Federal Excise Tax.
12. Any interpretations, corrections and/or changes to an RFQ and related Specifications or extensions to the opening/receipt date will be made by addenda to the respective document by the Collin County Purchasing Department. Questions and/or clarification requests must be submitted no later than the date specified in the solicitation. Those received at a later date may not be addressed prior to the public opening. Sole authority to authorize addenda shall be vested in Collin County Purchasing Agent as entrusted by the Collin County Commissioners Court. Addenda may be transmitted electronically via Collin County eProcurement Portal.
13. Addenda will be transmitted to all that are known to have received a copy of the RFQ and related Specifications. However, it shall be the sole responsibility of the Offeror to verify issuance/non-issuance of addenda and to check all avenues of document availability (i.e. <https://procurement.opengov.com/portal/collincountytx>, telephoning Purchasing Department directly, etc.) prior to opening/receipt date and time to ensure Offeror's receipt of any addenda issued. Offeror shall acknowledge receipt of all addenda.
14. All materials and services shall be subject to Collin County approval.
15. Collin County reserves the right to make awards as it deems to be in the best interest of the County.
16. The Offeror shall comply with Commissioners Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.
17. Offerors taking exception to the specifications shall do so at their own risk. By offering substitutions, Offeror shall state these exceptions in the section provided in the RFQ or by attachment. Exception/substitution, if accepted, must meet or exceed the specifications stated therein. Collin County reserves the right to accept or reject any and/or all of the exception(s)/substitution(s) deemed to be in the best interest of the County.
18. Minimum Standards for Responsible Prospective Offerors: A prospective Offeror must meet the following minimum requirements:
 19. have adequate financial resources, or the ability to obtain such resources as required;
 20. be able to comply with the required or proposed delivery/completion schedule;
 21. have a satisfactory record of performance;
 22. have a satisfactory record of integrity and ethics;
 23. be otherwise qualified and eligible to receive an award. Collin County may request documentation and other information sufficient to determine Offeror's ability to meet these minimum standards listed above.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

24. Offeror shall bear any/all costs associated with its preparation of an SOQ submittal.
25. Public Information Act: Collin County is governed by the Texas Public Information Act, Chapter 552 of the Texas Government Code. All information submitted by prospective offerors during the request for qualification process is subject to release under the Act.
26. The Offeror shall comply with Commissioners Court Order No. 2004-167-03-11, County Logo Policy.
27. Openings: All Statements submitted (Offeror's name only) will be read at the County's regularly scheduled opening for the designated project. However, the reading of a Statement at an opening should be not construed as a comment on the responsiveness of such Statement or as any indication that the County accepts such Statement as responsive. The County will make a determination as to the responsiveness of Statements submitted based upon compliance with all applicable laws, Collin County Purchasing Guidelines, and project documents, including but not limited to the specifications and contract documents. The County will notify the successful Offeror upon award of the contract and, according to state law; all Statements received will be available for inspection at that time.
28. Offeror shall comply with all local, state and federal employment and discrimination laws and shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, age, national origin or any other class protected by law.

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7. TERMS OF CONTRACT

1. Any resulting contract resulting from an accepted Statement of Qualifications shall be in the form of Collin County's standard Architects/Engineers agreement. No different or additional terms will become part of this contract with the exception of an Amendment.
2. No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All Amendments to the contract will be made in writing by Collin County Purchasing Agent.
3. No public official shall have interest in the contract, in accordance with Local Government Code Title 5, Subtitle C, Chapter 171.
4. The Provider shall comply with Commissioners' Court Order No. 96-680-10-28, Establishment of Guidelines & Restrictions Regarding the Acceptance of Gifts by County Officials & County Employees.
5. Design, strength, quality of materials and workmanship must conform to the highest standards of manufacturing and engineering practice.
6. Statements must comply with all federal, state, county and local laws concerning the type(s) of product(s)/service(s)/equipment/project(s) contracted for, and the fulfillment of all ADA (Americans with Disabilities Act) requirements.
7. All products must be new and unused, unless otherwise specified, in first-class condition and of current manufacture. Obsolete products, including products or any parts not compatible with existing hardware/software configurations will not be accepted.
8. Provider shall provide any and all notices as may be required under the Drug-Free Work Place Act of 1988, 28 CFR Part 67, Subpart F, to its employees and all sub-contractors to ensure that Collin County maintains a drug-free work place.
9. Provider shall defend, indemnify and save harmless Collin County and all its officers, agents and employees and all entities, their officers, agents and employees who are participating in this contract from all suits, claims, actions, damages (including personal injury and or property damages), or demands of any character, name and description, (including attorneys' fees, expenses and other defense costs of any nature) brought for or on account of any injuries or damages received or sustained by any person, persons, or property on account of Provider's breach of the contract arising from an award, and/or any negligent act, error, omission or fault of the Provider, or of any agent, employee, subcontractor or supplier of Provider in the execution of, or performance under, any contract which may result from an award. Provider shall pay in full any judgment with costs, including attorneys' fees and expenses which are rendered against Collin County and/or participating entities arising out of such breach, act, error, omission and/or fault.

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Providers must be in compliance with the provisions of Section 2254.0031 of the Texas Government Code, which incorporates by reference Section 271.904(d) of the Texas Local Government Code. Providers/Respondent shall perform services (1) with professional skill and care ordinarily provided by competent engineers or architects practicing under the same or similar circumstances and professional license, and (2) as expeditiously as is prudent considering the ordinary professional skill and care of a competent engineer or architect.

10. Expenses for Enforcement. In the event either Party hereto is required to employ an attorney to enforce the provisions of this Agreement or is required to commence legal proceedings to enforce the provisions hereof, the prevailing Party shall be entitled to recover from the other, reasonable attorney's fees and court costs incurred in connection with such enforcement, including collection.
11. The contract shall remain in effect until any of the following occurs: delivery of product(s) and/or completion and acceptance by Collin County of product(s) and/or service(s), contract expires or is terminated by either party with thirty (30) days written notice prior to cancellation and notice must state therein the reasons for such cancellation. Collin County reserves the right to terminate the contract immediately in the event the Provider fails to meet delivery or completion schedules, or otherwise perform in accordance with the specifications. Breach of contract or default authorizes the County to purchase elsewhere and charge the full increase in cost and handling to the defaulting Provider.
12. Collin County Purchasing Department shall serve as Contract Administrator or shall supervise agents designated by Collin County.
13. Provider shall notify the Purchasing Department immediately if delivery/completion schedule cannot be met. If a delay is foreseen, the Provider shall give written notice to the Purchasing Agent. The County has the right to extend delivery/completion time if the reason appears valid.
14. Collin County shall generate a purchase order(s) to the Provider and the purchase order number must appear on all itemized invoices. Collin County will not be responsible for any services rendered without a valid purchase order number.
15. Invoices shall be mailed directly to the Collin County Auditor's Office, 2300 Bloomdale Road, Suite 3100, McKinney, Texas 75071. All invoices shall show:
 16. Collin County Purchase Order Number;
 17. Provider's Name, Address and Tax Identification Number;
 18. Detailed breakdown of all charges for the product(s) and/or service(s) including applicable time frames.
 19. Payment will be made in accordance with Government Code, Title 10, Subtitle F, Chapter 2251.
 20. All warranties shall be stated as required in the Uniform Commercial Code.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

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21. The Provider and Collin County agree that both parties have all rights, duties, and remedies available as stated in the Uniform Commercial Code.
22. The Provider agrees to protect Collin County from any claims involving infringements of patents and/or copyrights.
23. The contract will be governed by the laws of the State of Texas. Should any portion of the contract be in conflict with the laws of the State of Texas, the State laws shall invalidate only that portion. The remaining portion of the contract shall remain in effect. The contract is performable in Collin County, Texas.
24. The Provider shall not sell, assign, transfer or convey the contract, in whole or in part, without the prior written approval from Collin County.
25. The apparent silence of any part of the specification as to any detail or to the apparent omission from it of a detailed description concerning any point, shall be regarded as meaning that only the best commercial practices are to prevail. All interpretations of the specification shall be made on the basis of this statement.
26. Provider shall not fraudulently advertise, publish or otherwise make reference to the existence of a contract between Collin County and Provider for purposes of solicitation. As exception, Provider may refer to Collin County as an evaluating reference for purposes of establishing a contract with other entities.
27. The Provider understands, acknowledges and agrees that if the Provider subcontracts with a third party for services and/or material, the primary Provider (awardee) accepts responsibility for full and prompt payment to the third party. Any dispute between the primary Provider and the third party, including any payment dispute, will be promptly remedied by the primary Provider. Failure to promptly render a remedy or to make prompt payment to the third party (sub-contractor) may result in the withholding of funds from the primary Provider by Collin County for any payments owed to the third party.
28. Criminal History Background Check: If required, ALL individuals may be subject to a criminal history background check performed by Collin County prior to access being granted to Collin County facilities. Upon request, Vendor/Contractor/Provider shall provide a list of individuals to the Collin County Purchasing Department within five (5) working days.
29. Non-Disclosure Agreement: When applicable, Provider shall be required to sign a non-disclosure agreement acknowledging that all information to be furnished is in all respects confidential in nature, other than information which is in the public domain through other means and that any disclosure or use of same by Provider, except as provided in the contract/agreement, may cause serious harm or damage to Collin County. Therefore, Provider agrees that Provider will not use the information

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furnished for any purpose other than that stated in contract/agreement, and agrees that Provider will not either directly or indirectly by agent, employee, or representative disclose this information, either in whole or in part, to any third party, except on a need to know basis for the purpose of evaluating any possible transaction. This agreement shall be binding upon Collin County and Provider, and upon the directors, officers, employees and agents of each.

30. Providers must be in compliance with the Immigration and Reform Act of 1986 and all employees specific to this solicitation must be legally eligible to work in the United States of America.
31. Certification of Eligibility: This provision applies if the anticipated Contract exceeds \$100,000.00 and as it relates to the expenditure of federal grant funds. By submitting a statement in response to this solicitation, the Provider certifies that at the time of submission, he/she is not on the Federal Government's list of suspended, ineligible, or debarred contractors. In the event of placement on the list between the time of statement submission and time of award, the Provider will notify the Collin County Purchasing Agent. Failure to do so may result in terminating this contract for default.
32. Notice to Providers delivering goods or performing services within the Collin County Detention Facility: The Collin County Detention Facility houses persons who have been charged with and/or convicted of serious criminal offenses. When entering the Detention Facility, you could: (1) hear obscene or graphic language; (2) view partially clothed male inmates; (3) be subjected to verbal abuse or taunting; (4) risk physical altercations or physical contact, which could be minimal or possibly serious; (5) be exposed to communicable or infectious diseases; (6) be temporarily detained or prevented from immediately leaving the Detention Facility in the case of an emergency or "lockdown"; and (7) subjected to a search of your person or property. While the Collin County Sheriff's Office takes every reasonable precaution to protect the safety of visitors to the Detention Facility, because of the inherently dangerous nature of a Detention Facility and the type of the persons incarcerated therein, please be advised of the possibility of such situations exist and you should carefully consider such risks when entering the Detention Facility. By entering the Collin County Detention Facility, you acknowledge that you are aware of such potential risks and willingly and knowingly choose to enter the Collin County Detention Facility.
33. Delays and Extensions of Time when applicable:
34. If the Provider is delayed at any time in the commence or progress of the Work by an act or neglect of the Owner or Architect/Engineer, or of an employee of either, or of a separate contractor employed by the Owner, or by changes ordered in the Work, or by labor disputes, fire, unusual delay in deliveries, unavoidable casualties or other causes beyond the Provider's control, or by delay authorized by the Owner pending mediation and arbitration, or by other causes which the Owner or Architect/Engineer determines may justify delay, then the Contract Time shall be extended by Amendment for such reasonable time as the Owner/Architect/Engineer may determine.

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35. If adverse weather conditions are the basis for a Claim for additional time, such Claim shall be documented by data substantiating that weather conditions were abnormal for the period of time and could not have been reasonably anticipated, and that the weather conditions had an adverse effect on the scheduled construction.
36. Disclosure of Certain Relationships: Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.
37. Disclosure of Interested Parties: Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.
38. Providers must be in compliance with the provisions of Section 2252.152 and Section 2252.153 of the Texas Government Code which states, in part, contracts with companies engaged in business with Iran, Sudan, or Foreign Terrorist Organizations are prohibited. A governmental entity may not enter into a contract with a company that is listed on the Comptroller of the State of Texas website identified under Section 806.051, Section 807.051 or Section 2253.253 which do business with Iran, Sudan or any Foreign Terrorist Organization. This Act is effective September 1, 2017.
39. Force Majeure: No party shall be liable or responsible to the other party, nor be deemed to have defaulted under or breached this Agreement, for any failure or delay in fulfilling or performing any term of this Agreement, when and to the extent such failure or delay is caused by or results from acts beyond the affected party's reasonable control, including, without limitation: acts of God; flood, fire or explosion; war, invasion, riot or other civil unrest; actions, embargoes or blockades in effect on or after the date of this Agreement; or national or regional emergency (each of the foregoing, a "Force

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Majeure Event"). A party whose performance is affected by a Force Majeure Event shall give notice to the other party, stating the period of time the occurrence is expected to continue and shall use diligent efforts to end the failure or delay and minimize the effects of such Force Majeure Event.

NOTE: All other terms and conditions (i.e. Insurance Requirements, Bond Requirements, etc.) shall be stated in the individual Solicitation documents as Special Terms, Conditions and Specifications.

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8. QUALIFICATIONS SUBMITTAL AND VENDOR RESPONSE

1. Qualification Format*

Qualifications shall be prepared SIMPLY AND ECONOMICALLY, providing a straightforward, CONCISE description of the Offeror's ability to meet the requirements of this RFQ. Emphasis shall be on the QUALITY, completeness, clarity of content, responsiveness to the requirements, and an understanding of Owner's needs.

Qualifications shall be a MAXIMUM of Twenty-five (25) PRINTED PAGES. The cover, table of contents, divider sheets, Collin County RFQ document, signature page, conflict of interest questionnaire, and W-9 do not count as printed pages.

Qualifications can be submitted either online or manually (**Both are NOT required**). Online submission is preferred. In total, the data entered into OpenGov, if printed, should then not exceed the 25-page limit.

Qualifications may be submitted online via <https://procurement.opengov.com/portal/collincountytx>. Online submission is preferred. In total, the data entered into OpenGov, if printed, should then not exceed the 25-page limit.

Qualifications submitted via email, CD-ROM, or Flash Drive will not be accepted.

If submitting manually, qualifications shall be submitted in a sealed envelope or box with RFQ name, number, and name of firm printed on the outside of the envelope or box. Manual submittals shall be sent/delivered to the following address and shall be received prior to the date/time for opening:

Collin County Purchasing
2300 Bloomdale, Suite 3160
McKinney, TX 75071

Paper copies shall be printed on letter size (8 ½ x 11) paper and assembled using spiral type bindings, staples, or binder clips. Do not use metal-ring hard cover binders. Manual submittals shall include an electronic copy in a searchable format.

It shall be the responsibility of the firm to insure that their submittal reaches Collin County Purchasing prior to the date/time for the opening no matter which submission method is used.

Offerors shall carefully read the information contained in this RFQ and submit a complete response to all requirements and questions as directed. Incomplete qualifications will be considered non-responsive and subject to rejection.

Qualifications and any other information submitted by Offerors in response to this RFQ shall become the property of the Owner.

The Owner will not compensate Offerors for any expenses incurred in Qualifications preparation or for any presentations that may be made, unless agreed to in writing in advance or required by law. Offerors submit Qualifications at their own risk and expense.

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Qualifications that are qualified with conditional clauses, alterations, items not called for in the RFQ documents, or irregularities of any kind are subject to rejection by the Owner, at its option.

Owner makes no representations of any kind that an award will be made as a result of this RFQ. The Owner reserves the right to accept or reject any or all Qualifications, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFQ when deemed to be in Owner's best interest.

Qualifications shall consist of answers to questions identified in Section 5 of the RFQ. It is not necessary to repeat the question in the Qualifications; however, it is essential to reference the question number with the corresponding answer.

Failure to comply with all requirements contained in this Request for Qualifications may result in the rejection of the Qualifications.

Additional attachments shall NOT be included with the Qualifications. Only the responses provided by the Offeror to the questions identified in this RFQ will be used by Collin County for evaluation.

Separate and identify each criteria response to Section 5 of this RFQ by use of a divider sheet with an integral tab for ready reference.

TABLE OF CONTENTS:

Submittals shall include a "Table of Contents" and give page numbers for each part of the Qualifications.

PAGINATION:

Number all pages of the submittal sequentially using Arabic numerals (1, 2, 3, etc.)

☐ Please confirm

*Response required

2. OFFEROR'S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE PROJECTS

2.1. *Provide a statement of interest including a narrative describing the Prime Firm's unique qualifications as they pertain to this request. Qualifications should include both Licensing and Certification.**

*Response required

2.2. *Please upload copies of license and certification here**

*Response required

2.3. *Provide a statement on the availability and commitment of the Prime Firm's and professionals to undertake projects.**

*Response required

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2.4. *Provide an Organization Chart for the team proposed for the projects.**

*Response required

2.5. *Provide resumes of key personnel from the consultants who will be assigned to this Project. **

Resumes limited to two (2) pages per person.

*Response required

3. PRIME FIRM'S ABILITY TO PROVIDE SERVICES

3.1. *Is your company currently for sale or involved in any transaction to expand or to become acquired by another business entity?**

☐ Yes

☐ No

*Response required

When equals "Yes"

3.1.1. *Please explain the impact both in organizational and directional terms.**

*Response required

3.2. *Provide any details of all past or pending litigation or claims filed against your company that would affect your company's performance under a Contract with the Owner.**

*Response required

3.3. *Is your company currently in default on any loan agreement or financing agreement with any bank, financial institution, or other entity?**

☐ Yes

☐ No

*Response required

When equals "Yes"

3.3.1. *Specify date(s), details, circumstances, and prospects for resolution**

*Response required

3.4. *Does any relationship exist by relative, business associate, capital funding agreement, or any other such kinship between your firm and any Owner employee or elected official?**

☐ Yes

☐ No

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*Response required

When equals "Yes"

3.4.1. *Please explain**

*Response required

3.5. *Provide a claims history under professional malpractice insurance for the past five (5) years for the Prime Firm and any team members proposed to provide professional engineering services.**

*Response required

4. RESPONDENT'S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS

4.1. *List a maximum of five (5) projects for which you have provided services that are most related to this project. **

List the projects in order of priority, with the most relevant project listed first. For all consultants are named in the response indicate the projects they also worked on. Provide the following information for each project listed:

1. Project name, location, contract delivery method, and description
2. Actual start and finish dates for project
3. Description of services provided for the project
4. Name of Project Manager (individual responsible to the Owner for the overall success and coordinating the day-to-day work of the project)
5. Consultants References (for each project listed above, identify the following):
 - i. The Owner's name and representative who served as the day-to-day liaison during the consulting phases of the project, including telephone number.

References shall be considered relevant based on specific project participation and experience with the Respondent. The Owner may contact references during any part of this process. The Owner reserves the right to contact any other references at any time during the RFQ process.

*Response required

5. RESPONDENT'S KNOWLEDGE OF BEST PRACTICES

5.1. *Describe the Prime Firm's methodology and its process for modernization.**

*Response required

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- 5.2. *Describe the Prime Firm's quality assurance program explaining the method used and how the firm maintains quality control during the development of documents and quality assurance during the Consulting phase of a project. **

Provide specific examples of how these techniques or procedures were used for any combination of three (3) projects listed in response to the section "Respondent's Performance on Past Representative Projects".

*Response required

- 5.3. *Describe the way in which your firm develops and maintains work schedules and timelines to coordinate with the Owner's project schedule. **

For any combination of three (3) projects listed in response to question "Respondent's Performance on Past Representative Projects", provide examples of how these techniques were used.

*Response required

- 5.4. *Describe the types of records, reports, monitoring systems, and information management systems, which your firm used in the management of the projects listed above. **

Describe how you used these systems for any combination of three (3) projects listed in response to question "Respondent's Performance on Past Representative Projects".

*Response required

- 5.5. *Describe how you plan to ensure continuity of project objectives that meets the Owner's requirements. **

*Response required

- 5.6. *Describe the project team's approach to assuring timely completion of projects, including methods you will use for schedule recovery if necessary. **

*Response required

- 5.7. *Describe how you track Owner input and review comments to confirm that they have been addressed. **

Provide examples of reports/logs used for tracking response to and closure on Owner comments.

*Response required

6. RESPONDENT'S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS

- 6.1. *Describe your understanding of the administrative challenges and opportunities associated with providing Consulting services for the assigned elevator/escalator modernization and your strategy for resolving these issues. **

*Response required

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6.2. *What do you perceive are the critical issues for this project?**

*Response required

6.3. *Understanding schedule limitations provide an analysis of the Owner's project planning schedule and describe how you plan to develop and communicate design, scope, and budget options in a form that will quickly facilitate the Owner's decision making.**

*Response required

6.4. *Describe the project team's experience with modernization and consulting projects.**

*Response required

6.5. *For any three (3) of the projects listed in response to question "Respondent's Performance on Past Representative Projects", describe any conflicts with the Owner, Contractor, or subcontractors, and describe the methods your firm used to resolve those conflicts.**

*Response required

7. VENDOR RESPONSES

7.1. *Notice**

Collin County exclusively uses OpenGov eProcurement Portal for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could ultimately render your bid/proposal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other means.

☐ Please confirm

*Response required

7.2. *Contact Information**

List the contact name, email address and phone number of the main person(s) Collin County should contact in reference to this solicitation. Contact(s) shall be duly authorized. List authorized by the company, corporation, firm, partnership or individual to respond to any questions, clarification, and/or offers in response to this solicitation.

*Response required

7.3. *Exceptions**

Do you take exception to the specifications?

☐ Yes

☐ No

*Response required

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When equals "Yes"

*7.3.1. Please state your exceptions**

*Response required

*7.4. Insurance Acknowledgement**

I understand that the insurance requirements of this solicitation are required and are included in the submitted pricing. A certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract.

☐ Please confirm

*Response required

*7.5. Subcontractors**

State the business name of all subcontractors and the type of work they will be performing under this contract. If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".

*Response required

*7.6. Reference No. 1**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

*Response required

*7.7. Reference No. 2**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

*Response required

*7.8. Reference No. 3**

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

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Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

*Response required

7.9. *Debarment Certifications**

I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations.

☐ Please confirm

*Response required

7.10. *Immigration and Reform Act**

I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America. I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County.

☐ Please confirm

*Response required

7.11. *Disclosure of Certain Relationships**

Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

☐ Please confirm

*Response required

7.12. *Anti-Collusion Statement**

Bidder certifies that its Bid/Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid/Proposal for the same materials, services, supplies, or

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

equipment and is in all respects fair and without collusion or fraud. No premiums, rebates or gratuities permitted; either with, prior to, or after any delivery of material or provision of services. Any such violation may result in Agreement cancellation, return of materials or discontinuation of services and the possible removal from bidders list.

☐ Please confirm

*Response required

*7.13. Disclosure of Interested Parties**

Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

☐ Please confirm

*Response required

*7.14. Notification Survey**

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165. How did you receive notice of this request?

*Response required

*7.15. Critical Infrastructure Affirmation**

Pursuant to section 2274.0102 of the Texas Government Code, Respondent certifies that neither it nor its parent company, nor any affiliate of Respondent or its parent company, is: (1) majority owned or controlled by citizens or governmental entities of China, Iran, North Korea, Russia, or any other country designated by the Governor under Government Code Section 2274.0103, or (2) headquartered in any of those countries.

☐ Please confirm

*Response required

*7.16. Energy Company Boycotts**

Pursuant to Section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent represents and warrants that: (1) it does not, and will not for the duration of the contract, boycott energy companies, and (2) will not

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

boycott energy companies during the term of the contract. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency.

☐ Please confirm

*Response required

7.17. *Firearm Entities and Trade Associations Discrimination**

Pursuant to section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent verifies that:

1. It does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency.

☐ Please confirm

*Response required

7.18. *W-9**

Please upload your W-9 Form

*Response required

7.19. *Information Regarding Conflict of Interest**

During the 79th Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the

84th Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS: <https://www.ethics.state.tx.us/forms/conflict/>

The vendor acknowledges by doing business or seeking to do business with Collin County that they have been notified of the requirements under Chapter 176 of the Texas Local Government Code and that they are solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers: <https://www.collincountytx.gov/Contact/county-officials>

At the time of this solicitation being released, the following are known to be involved in the planning, recommending, selecting, and/or contracting for the attached procurement:

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

Department:

Rick Monk-Director of Facilities

Ricky Thomas-Superintendent Facilities

Ian Capps-Facilities Tech Coordinator

David Rogers-Facilities Tech Coordinator

Jayson Hopper-Facilities Tech Coordinator

Purchasing:

Michelle Charnoski, NIGP-CPP, CPPB – Purchasing Agent

Marci Chrismon, CPPB – Assistant Purchasing Agent

Cory Rogers-Senior Buyer

Commissioners Court:

Chris Hill – County Judge

Susan Fletcher – Commissioner Precinct No. 1

Cheryl Williams – Commissioner Precinct No. 2

Darrell Hale – Commissioner Precinct No. 3

Duncan Webb – Commissioner Precinct No. 4

*Response required

Complete the CIQ attachment and upload.

*Response required

7.20. Confirmation of Submittal - Please Initial*

This execution of offer must be completed (initialed) and returned (if submitting manually) with the respondent's qualifications. Failure to complete this execution of offer with the qualifications may result in rejection of the qualifications. Submitting a false statement may void the submitted qualifications or any agreements or other contractual arrangements, which may result from the submission of respondent's qualifications. A false certification shall be deemed a material breach of contract and, at owner's option, may result in termination of any resulting contract or purchase order.

REPRESENTATIONS By confirming below, Respondent represents and warrants that:

1. the Qualifications and all statements and information prepared and submitted in response to this RFQ are current, complete, true and correct;

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Request For Qualification #2025-137

Title: Elevator and Escalator Vertical Transportation Consulting

2. it is not given, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount trip, favor or service to a public servant in connection with the submitted Qualifications or any subsequent proposal. Failure to sign below, or signing a false statement, may void the Response or any resulting contracts at the Owner's option, and the Respondent may be removed from all future proposal lists at this County;
3. the individual signing this document and the documents made part of the RFQ is authorized to sign such documents on behalf of the Respondent and to bind the Respondent under any contract which may result from the submission of the Response;
4. no relationship, whether as a relative, business associate, by capital funding agreement or by any other such kinship exists between Respondent and an employee of Collin County, Texas
5. no compensation has been received for participation in the preparation of this RFQ (ref. Section 2155.004 Texas Government Code);
6. Respondent complies with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action;
7. to the best of its knowledge, no member Collin County Commissioners Court or Elected official has a financial interest, directly or indirectly, in the Project; and
8. each individual or business entity proposed by Respondent as a member of its team that will engage in the practice of engineering will be selected based on demonstrated competence and qualifications only.

Maximum response length: 5 characters

*Response required

7.21. Offeror Acknowledgment*

Offeror acknowledges that they understand the specifications, any and all addenda, agrees to the terms and conditions, and can provide the minimum requirements stated herein. Offeror acknowledges they have read the document in its entirety and is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in the statement submitted resulting from Offeror's failure to do so. If statement is accepted, offeror further certifies and agrees to furnish any and all services upon conditions in the specifications of the Statement of Qualifications.

☐ Please confirm

*Response required

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Product Type	Make	Item	Item Description	Unit Serial Number	Factory Serial Number	Legal Identification Number	LOCATION	Unit Name	Building Name	Ship To Address1	Ship To City	Ship To State
ELEVATOR	KONE	EL-MR-003	EL MR GEARLESS	US321939	20273194	71819	CENTER OF BUILDING	1	COLLIN COUNTY ADMIN BLDG	2300 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	KONE	EL-MR-003	EL MR GEARLESS	US321941	20273195	71820	CENTER OF BUILDING	2	COLLIN COUNTY ADMIN BLDG	2300 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	MONTGOMERY	EL-HY-004	EL HY IN-GROUND	US321949	CP-75356	19162	BY FRONT DOORS	1	COLLIN COUNTY CENTRAL PLANT	4800 COMMUNITY AVE	MCKINNEY	TX
ELEVATOR	KONE	EL-MR-003	EL MR GEARLESS	US322068	CP75355	19156	EAST OF BACK DOCK	MATERIAL LIFT DOCK	COLLIN COUNTY JUSTICE CENTER	4300 COMMUNITY AVE	MCKINNEY	TX
ELEVATOR	MONTGOMERY	EL-HY-004	EL HY IN-GROUND	US322071	CP75355	19156	BY CLUSTER 3&4 HALLWAY	PRISONER TRANSPORT	COLLIN COUNTY JUSTICE CENTER	4300 COMMUNITY AVE	MCKINNEY	TX
ELEVATOR	KONE	EL-HY-004	EL MR GEARLESS	US322097	20243701	41460	INSIDE JAIL LOBBY	JAIL LOBBY	COLLIN COUNTY JUSTICE CENTER	4300 COMMUNITY AVE	MCKINNEY	TX
ELEVATOR	MONTGOMERY	EL-HY-004	EL HY IN-GROUND	US322098	CP75354	19161	TOP OF STAIRS	S.O.	COLLIN COUNTY JUSTICE CENTER	4300 COMMUNITY AVE	MCKINNEY	TX
ELEVATOR	MONTGOMERY	EL-HY-004	EL HY IN-GROUND	US322113	28164	50132	CENTER OF BUILDING	1	COLLIN COUNTY PARK PLAZA - 920 E PARK BLVD	PLANO	PLANO	TX
ELEVATOR	UNITED	EL-HY-004	EL HY IN-GROUND	US322117	13857	19153	WEST SIDE OF BUILDING	2 - West	COLLIN COUNTY PARK PLAZA - 900	900 E PARK BLVD	PLANO	TX
ELEVATOR	UNITED	EL-HY-004	EL HY IN-GROUND	US322118	16848	19154	EAST SIDE OF BUILDING	1 - East	COLLIN COUNTY PARK PLAZA - 900	900 E PARK BLVD	PLANO	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322167	C2940-01	67503	INMATE ELEVATOR	1	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322169	C2941-03	67505	WEST EMPLOYEE	3	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322170	C2941-02	67504	WEST EMPLOYEE	2	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322171	C2943-06	67508	PUBLIC ELEVATOR	6	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322172	C2963-04	67506	INMATE ELEVATOR	4	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322174	C2943-05	67507	PUBLIC ELEVATOR	5	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322175	C2942-10	67513	JUDGE ELEVATOR	10	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322184	C2944-08	56474	FREIGHT ELEVATOR	8	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322185	C2961-07	67509	INMATE ELEVATOR	7	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322186	C2942-09	67512	JUDGE ELEVATOR	9	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	SCHINDLER	EL-MR-003	EL MR GEARLESS	US322194	C2942-11	67514	INMATE ELEVATOR	11	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322196	C2610-02	66699	1 - 2 UP	ESC 1	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322200	C2610-01	66680	2 - 1 DOWN	ESC 2	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322206	C2939-04	66682	2 - 3 UP	ESC 3	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322204	F7512-01	81421	LL - 1 UP	ESC 5	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322205	F7512-02	81422	1 - LL DOWN	ESC 6	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ESCALATOR	SCHINDLER	ES-ES-001	ESCALATOR	US322201	C2939-03	66661	3 - 2 DOWN	ESC 4	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
CHAIR LIFT	NATIONAL	ST-CH-001	ST CHAIR	US322210	108115	64506	401 DISTRICT COURT	CHAIR LIFT 1	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
CHAIR LIFT	NATIONAL	ST-CH-001	ST CHAIR	US322211	108113	64508	188 DISTRICT COURT	CHAIR LIFT 3	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
CHAIR LIFT	NATIONAL	ST-CH-001	ST CHAIR	US322212	108116	64509	416 DISTRICT COURT	CHAIR LIFT 4	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
CHAIR LIFT	NATIONAL	ST-CH-001	ST CHAIR	US322213	108114	64507	AUX COURT	CHAIR LIFT 2	COLLIN COUNTY COURTHOUSE	2100 BLOOMDALE RD	MCKINNEY	TX
ELEVATOR	JOYCE	EL-HY-001	EL HYDRAULIC	US903628	VSC004259-00		SOUTH EAST BAY AREA	MATERIAL LIFT	PUBLIC WORKS BUILDING	700 WILMETH RD #A	MCKINNEY	TX



EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Collin County, TX

Purchasing

Michelle Charnoski, Purchasing Agent

2300 Bloomdale Rd, McKinney, TX 75071

(972) 548-4165

ADDENDA REPORT

RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

RESPONSE DEADLINE: April 24, 2025 at 2:00 pm

Monday, June 2, 2025

Addenda Issued:

Addendum #1

Apr 15, 2025 3:48 PM

Changed: Insurance Requirements B. iv Professional/Errors& Omissions Liability Each Occurrence/Aggregate \$5,000,000.00 to

Professional/Errors& Omissions Liability Each Occurrence/Aggregate \$1,000,000.00 and Insurance Requirements B. v. Umbrella/Excess Liability Insurnace \$5,000,000.00 to Umbrella/Excess Liability Insurnace \$1,000,000.00

Please use the [See What Changed](#) link to view all the changes made by this addendum.

Addendum #2

Apr 15, 2025 3:48 PM

Added: Language to 3.1 Scope of Serices 4. Service Requirements :

vi. Prepare and submit a detailed final report that includes:

a. The overall condition and plan of modernizing of all county elevators and escalators.

vii. Provide electronic and physical copies of the final report to Collin County.

Please use the [See What Changed](#) link to view all the changes made by this addendum.



EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS

Collin County, TX

Purchasing

Michelle Charnoski, Purchasing Agent

2300 Bloomdale Rd, McKinney, TX 75071

(972) 548-4165

QUESTION & ANSWER REPORT

RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

RESPONSE DEADLINE: April 24, 2025 at 2:00 pm

Monday, June 2, 2025

Approved, Unanswered Questions

Approved, Answers Provided

1. Scope and Pricing

Mar 31, 2025 2:22 PM

Question: Based on the format of the RFP, are you looking for pricing or is this a qualifications based response? If looking for pricing, please clarify the exact scope of work.

Mar 31, 2025 2:22 PM

Answered by Marci Chrismon: This is a Request for Qualifications; therefore pricing should not be included in your response. The Scope of Work is outlined in 3.0

Apr 8, 2025 4:30 PM

2. License

Apr 4, 2025 9:56 AM

Question: I have a question regarding Item B. Qualifications. The qualification states that we must possess the following: Licensed and insured in the State of Texas for elevator consulting. We are insured, but the State of Texas does not offer a license for elevator consulting. I'm unclear on what you would like us to provide for this requirement.

Apr 4, 2025 9:56 AM

Answered by Marci Chrismon: Please submit any required license to do consulting work on elevators in Texas, for example, inspections require a license in Texas. List any license or other qualifications your company holds that would benefit your company's qualifications.

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS
QUESTION & ANSWER REPORT
RFQ No. 2025-137
Elevator and Escalator Vertical Transportation Consulting

Apr 8, 2025 4:30 PM

3. Insurance

Apr 3, 2025 10:46 AM

Question: The sample professional services agreement is only asking for \$1 million in coverage, however the RFP documents states a requirement of \$5 million. We carry \$2 million. Is that sufficient?

Apr 3, 2025 10:46 AM

Answered by Cory Rogers: The insurance requirement is \$1,000,000.00 as indicated in the Addendum 1.

Apr 15, 2025 3:48 PM

4. Inspections

Apr 3, 2025 10:49 AM

Question: Page 7, 3. Scope of Work, first bullet states, "Performing thorough inspections of existing elevators and escalators to assess condition and compliance". Does this scope include annual inspections as required by the AHJ? Or are you only referring to audit inspections specific to this project?

Apr 3, 2025 10:49 AM

Answered by Marci Chrismon: The Scope is referring to audit inspections specific to this project. This is a phased multi-year approach based on priority of equipment as directed by facilities. Audits can be based on service history and life cycle of equipment.

Apr 8, 2025 4:30 PM

5. Consultation Meetings

Apr 3, 2025 10:52 AM

Question: Page 7, Item 1. Consultation Meetings, second bullet states: "Regular update meetings (at least bi-weekly) to report on progress and findings." Will these meetings be conducted in person or remote. If both, how often would you require in-person meetings?

Apr 3, 2025 10:52 AM

Answered by Marci Chrismon: Remote is acceptable for consulting meetings. Construction, reconditioning work is on site for preconstruction and biweekly for performance.

Apr 8, 2025 4:30 PM

6. Inspection Procedures

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS
QUESTION & ANSWER REPORT
RFQ No. 2025-137
Elevator and Escalator Vertical Transportation Consulting

Apr 3, 2025 10:57 AM

Question: Page 7, Item 2. Inspection Procedures; second bullet states, "Utilize appropriate testing equipment and methods to diagnose issues". As consultants we would not be performing test. Therefore, would we be utilizing your maintenance provider to perform required test? Again, are we referring to AHJ required tests here (CAT 1, CAT 5)?

Apr 3, 2025 10:57 AM

Answered by Cory Rogers: Collaboration between The County and the awarded vendor is expected. The County will provide documentation and determine age and historical repairs. No AHJ will be involved in awarded Offeror's work

Apr 10, 2025 8:28 AM

7. Reporting Responsibilities

Apr 3, 2025 11:00 AM

Question: Page 8, Item 3. Reporting Responsibilities, 5., second bullet states, "Prepare and submit a detailed final report that includes:" It appears there is information missing here. Please advise.

Apr 3, 2025 11:00 AM

Answered by Cory Rogers: This is overview of condition, ages and professional recommendations. This will be a combined effort with facilities and elevator OEMs possibly. Reporting will be for The County as to the overall condition and plan of modernizing of all county elevators and escalators as added by Addendum 2.

Apr 15, 2025 3:48 PM

8. Communication

Apr 3, 2025 11:02 AM

Question: Page 8, Item 4. Communication, second bullet states, "Respond to requests for information or clarification within 48 hours." Is this 48 hrs. response time meaning business days, or would it include weekends. For example if a request came in at 4pm on a Friday, would you expect a response by 4pm Sunday, or 4pm Tuesday?

Apr 3, 2025 11:02 AM

Answered by Marci Chrismon: Business days, weekends are not included.

Apr 8, 2025 4:30 PM

9. No subject

Apr 3, 2025 1:16 PM

EXHIBIT A RFQ 2025-137 INCLUDING ADDENDA AND COUNTY RESPONSE TO QUESTIONS
QUESTION & ANSWER REPORT
RFQ No. 2025-137
Elevator and Escalator Vertical Transportation Consulting

Question: Would Collin County be open to consideration of a Design-Build concept to expedite equipment ordering and streamline construction?

Apr 3, 2025 1:16 PM

Answered by Cory Rogers: No, this is a solicitation for a consulting contract for a multiyear phased approach to do reconditioning of most, if not all of the escalators and elevators in The County, only as budget allows year to year.

Apr 10, 2025 9:12 AM



EXHIBIT B PROVIDER RESPONSE
Collin County, TX
Purchasing
Michelle Charnoski, Purchasing Agent
2300 Bloomdale Rd, McKinney, TX 75071

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT

RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

RESPONSE DEADLINE: April 24, 2025 at 2:00 pm

Report Generated: Monday, June 2, 2025

ATIS Elevator Inspections, LLC Response

CONTACT INFORMATION

Company:

ATIS Elevator Inspections, LLC

Email:

jsitzmann@atis.com

Contact:

Jay Sitzmann

Address:

600 Emerson Road
Suite 225
St Louis, MO 63141

Phone:

N/A

Website:

www.atis.com

Submission Date:

Apr 24, 2025 11:44 AM (Central Time)

EXHIBIT B PROVIDER RESPONSE

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT

RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

ADDENDA CONFIRMATION

Addendum #1

Confirmed Apr 22, 2025 10:54 AM by Jay Sitzmann

Addendum #2

Confirmed Apr 22, 2025 10:54 AM by Jay Sitzmann

QUESTIONNAIRE

1. Qualification Format*

Qualifications shall be prepared SIMPLY AND ECONOMICALLY, providing a straightforward, CONCISE description of the Offeror's ability to meet the requirements of this RFQ. Emphasis shall be on the QUALITY, completeness, clarity of content, responsiveness to the requirements, and an understanding of Owner's needs.

Qualifications shall be a MAXIMUM of Twenty-five (25) PRINTED PAGES. The cover, table of contents, divider sheets, Collin County RFQ document, signature page, conflict of interest questionnaire, and W-9 do not count as printed pages.

Qualifications can be submitted either online or manually (**Both are NOT required**). Online submission is preferred. In total, the data entered into OpenGov, if printed, should then not exceed the 25-page limit.

Qualifications may be submitted online via <https://procurement.opengov.com/portal/collincountytx>. Online submission is preferred. In total, the data entered into OpenGov, if printed, should then not exceed the 25-page limit.

Qualifications submitted via email, CD-ROM, or Flash Drive will not be accepted.

If submitting manually, qualifications shall be submitted in a sealed envelope or box with RFQ name, number, and name of firm printed on the outside of the envelope or box. Manual submittals shall be sent/delivered to the following address and shall be received prior to the date/time for opening:

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT

Request For Qualification - Elevator and Escalator Vertical Transportation Consulting

Page 2

EXHIBIT B PROVIDER RESPONSE

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT
RFQ No. 2025-137
Elevator and Escalator Vertical Transportation Consulting

Collin County Purchasing
2300 Bloomdale, Suite 3160
McKinney, TX 75071

Paper copies shall be printed on letter size (8 ½ x 11) paper and assembled using spiral type bindings, staples, or binder clips. Do not use metal-ring hard cover binders. Manual submittals shall include an electronic copy in a searchable format.

It shall be the responsibility of the firm to insure that their submittal reaches Collin County Purchasing prior to the date/time for the opening no matter which submission method is used.

Offerors shall carefully read the information contained in this RFQ and submit a complete response to all requirements and questions as directed. Incomplete qualifications will be considered non-responsive and subject to rejection.

Qualifications and any other information submitted by Offerors in response to this RFQ shall become the property of the Owner.

The Owner will not compensate Offerors for any expenses incurred in Qualifications preparation or for any presentations that may be made, unless agreed to in writing in advance or required by law. Offerors submit Qualifications at their own risk and expense.

Qualifications that are qualified with conditional clauses, alterations, items not called for in the RFQ documents, or irregularities of any kind are subject to rejection by the Owner, at its option.

Owner makes no representations of any kind that an award will be made as a result of this RFQ. The Owner reserves the right to accept or reject any or all Qualifications, waive any formalities or minor technical inconsistencies, or delete any item/requirements from this RFQ when deemed to be in Owner's best interest.

Qualifications shall consist of answers to questions identified in Section 5 of the RFQ. It is not necessary to repeat the question in the Qualifications; however, it is essential to reference the question number with the corresponding answer.

Failure to comply with all requirements contained in this Request for Qualifications may result in the rejection of the Qualifications.

Additional attachments shall NOT be included with the Qualifications. Only the responses provided by the Offeror to the questions identified in this RFQ will be used by Collin County for evaluation.

Separate and identify each criteria response to Section 5 of this RFQ by use of a divider sheet with an integral tab for ready reference.

TABLE OF CONTENTS:

EXHIBIT B PROVIDER RESPONSE

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT

RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

Submittals shall include a "Table of Contents" and give page numbers for each part of the Qualifications.

PAGINATION:

Number all pages of the submittal sequentially using Arabic numerals (1, 2, 3, etc.)

Confirmed

2. OFFEROR'S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE PROJECTS

PROVIDE A STATEMENT OF INTEREST INCLUDING A NARRATIVE DESCRIBING THE PRIME FIRM'S UNIQUE QUALIFICATIONS AS THEY PERTAIN TO THIS REQUEST. QUALIFICATIONS SHOULD INCLUDE BOTH LICENSING AND CERTIFICATION.*

April 23, 2025

Collin County

Attn: Cory Rogers

2300 Bloomdale Road #3160

McKinney, TX 75071

Dear Mr. Rogers,

ATIS Elevator Inspections LLC (ATIS) proposes to provide Collin County with Elevator and Escalator Vertical Transportation Services as presented in the RFQ 2025-137.

ATIS has the largest dedicated team of vertical transportation inspectors and consultants in the United States, which consists of more than more than 300 elevator professionals, 140 are licensed Qualified Elevator Inspectors (QEIs) and 20 Professional Engineers. We maintain our own proprietary inspection, and certificate management database, supported by over 40 back-office personnel who work together to deliver timely and reliable consulting, inspection, and test witnessing services with the highest level of integrity and professionalism.

ATIS was established in November 2012 to better serve the elevator needs of facility owners, property managers, and the authority having jurisdiction (AHJ) across the country. ATIS's vision is "People moving in a world with no conveyance related accidents" which is

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supported by a simple mission to “elevate conveyance safety, compliance and performance”. ATIS strives to provide a great work environment and unparalleled customer service. Our company values promote personal responsibility, integrity, honesty, along with a collaborative mindset and customer centric disposition. We encourage constructive feedback as we continuously strive to improve the customer experience.

Additionally, Collin County will receive the benefit of ATIS’s key core competencies, which include:

- *Unsurpassed Conveyance Expertise*: ATIS brings a team of over 185 QEI Certified Inspectors who perform third-party inspection, testing, consulting, and certification services to more than 30,000 customers. ATIS’s field expertise and depth is unmatched in the elevator inspection industry.
- *Value-Added Services, ATIS Alert*: We developed our own ATIS Alert technology which conveniently and automatically notifies customers when it is time for their building’s elevators, escalators, and other conveyances to be inspected. ATIS is the only comprehensive conveyance management company in the U.S. that currently offers this level of monitoring and notification that can be seen in real time and assures our clients and partners that all conveyances within a building remain compliant with jurisdictional laws.
- *Commitment to Excellence*: Named one of the Inc. Magazine’s Fastest Growing Private Companies, our unwavering commitment to safety and our people has helped us accumulate one of the largest and most experienced elevator teams in the world.

These factors and the culture of continuous improvement help ensure that Collin County will receive superior service from ATIS, a company with sound operational and financial strength.

In this statement of qualifications, we express our firm commitment to delivering outstanding performance on behalf of Collin County, delivering all the services defined in the solicitation. Our past performance providing consulting, test witnessing and inspection, and certificate management services similar in scope for states, cities, and municipalities, and private entities across the country is strong evidence that our management and key personnel have the experience, capabilities, and qualifications necessary to meet all the requirements of this contract. ATIS brings a culture of excellence, dedication, and integrity unique to this industry.

A hallmark of ATIS’ approach is a culture of continuous improvement. All our processes and deliverables are continuously refined and improved through client and employee feedback. ATIS is involved in industry associations, safety organizations and the Code committees which promulgate the elevator and escalator safety codes. As such, we are at the cutting edge of technological advancements and safety issues developing within the industry. ATIS core business of vertical transportation inspection also puts us in the field for firsthand knowledge of the issues and contractor’s approaches in the field. Being directly involved in these two sides of

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the elevator business position, ATIS perfectly recognizes trends and responds to them with thoughtful and deliberate strategies for the best outcomes for our client’s behalf.

Our team has years of experience providing equipment assessment, maintenance assessments, elevator logs and document reviews on our client’s vertical transportation portfolios like Collin County’s. ATIS’ understanding of the resources and expertise needed for this effort will provide trouble free, thorough and timely deliverable.

To simplify the evaluation of our submission, we have copied and inserted the RFQ section and checklist information to identify which section of our response contains the information requested.

We welcome the opportunity to meet with the decision makers for the County and discuss why ATIS is best suited to be a partner in the improvement of the vertical transportation systems owned by the County.

PLEASE UPLOAD COPIES OF LICENSE AND CERTIFICATION HERE*

QEI_Licenses.pdf

PROVIDE A STATEMENT ON THE AVAILABILITY AND COMMITMENT OF THE PRIME FIRM'S AND PROFESSIONALS TO UNDERTAKE PROJECTS.*

Project Team Members	Title	Responsibilities	Percentage Allocation	Tasks
Dave Hardin	Consulting Director - Central	Project Support	5%	Principal In Charge
Andre Chionh	Elevator Consultant	Project Lead	20%	Lead Consultant/PM
David Sandstrom	Inspectors QEI	Inspector	10%	Elevator Inspector
Dennis Cherry	Inspectors QEI	Inspector	10%	Elevator Inspector
Jacob Lownsdale	Billing Supervisor	Project Invoicing	5%	Tech. Admin. Support

PROVIDE AN ORGANIZATION CHART FOR THE TEAM PROPOSED FOR THE PROJECTS.*

Collin_County_-_Org_Chart_-_ATIS_Consulting_Team.pdf

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PROVIDE RESUMES OF KEY PERSONNEL FROM THE CONSULTANTS WHO WILL BE ASSIGNED TO THIS PROJECT.*

Resumes limited to two (2) pages per person.

AndreChionh.pdf

DaveHardin.pdf

3. PRIME FIRM'S ABILITY TO PROVIDE SERVICES

IS YOUR COMPANY CURRENTLY FOR SALE OR INVOLVED IN ANY TRANSACTION TO EXPAND OR TO BECOME ACQUIRED BY ANOTHER BUSINESS ENTITY?*

No

PROVIDE ANY DETAILS OF ALL PAST OR PENDING LITIGATION OR CLAIMS FILED AGAINST YOUR COMPANY THAT WOULD AFFECT YOUR COMPANY'S PERFORMANCE UNDER A CONTRACT WITH THE OWNER.*

No past or pending litigations or claims to report that would effect our performance under a Contract with the Owner.

IS YOUR COMPANY CURRENTLY IN DEFAULT ON ANY LOAN AGREEMENT OR FINANCING AGREEMENT WITH ANY BANK, FINANCIAL INSTITUTION, OR OTHER ENTITY?*

No

DOES ANY RELATIONSHIP EXIST BY RELATIVE, BUSINESS ASSOCIATE, CAPITAL FUNDING AGREEMENT, OR ANY OTHER SUCH KINSHIP BETWEEN YOUR FIRM AND ANY OWNER EMPLOYEE OR ELECTED OFFICIAL?*

No

PROVIDE A CLAIMS HISTORY UNDER PROFESSIONAL MALPRACTICE INSURANCE FOR THE PAST FIVE (5) YEARS FOR THE PRIME FIRM AND ANY TEAM MEMBERS PROPOSED TO PROVIDE PROFESSIONAL ENGINEERING SERVICES.*

Claims_History_Statement.pdf

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4. RESPONDENT’S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS

LIST A MAXIMUM OF FIVE (5) PROJECTS FOR WHICH YOU HAVE PROVIDED SERVICES THAT ARE MOST RELATED TO THIS PROJECT. *
List the projects in order of priority, with the most relevant project listed first. For all consultants are named in the response indicate the projects they also worked on. Provide the following information for each project listed:

- 1. Project name, location, contract delivery method, and description
- 2. Actual start and finish dates for project
- 3. Description of services provided for the project
- 4. Name of Project Manager (individual responsible to the Owner for the overall success and coordinating the day-to-day work of the project)
- 5. Consultants References (for each project listed above, identify the following):
 - i. The Owner’s name and representative who served as the day-to-day liaison during the consulting phases of the project, including telephone number.

References shall be considered relevant based on specific project participation and experience with the Respondent. The Owner may contact references during any part of this process. The Owner reserves the right to contact any other references at any time during the RFQ process.

ATIS_Elevator_Consulting.docx

5. RESPONDENT’S KNOWLEDGE OF BEST PRACTICES

DESCRIBE THE PRIME FIRM’S METHODOLOGY AND ITS PROCESS FOR MODERNIZATION.*

Process	and	Procedures	–	Data	Collection
ATIS employs experienced and deeply knowledgeable industry subject matter experts who will be tasked with on-site visual observation and documentation of the site conditions using our UpVate Anywhere mobile application and field data collection skills. Equipment lists are preloaded, and details are captured then stored in ATIS’ extensive database. Through these tactical data collection processes, our					

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consultant team can assess equipment life cycle, component level obsolescence, and Code required upgrades which might affect the on-going operation of the equipment and net useful life expectancy.

a) Tactical data collection

- All onsite visits are documented via our UpVate Anywhere mobile data collection system and reports are created for each unit for each visit. Physical observation of machine rooms, control spaces, pits, overheads is complemented by riding the equipment and observing the operation. While we have found that technical measurement systems and technological advances are a useful and complementary tool, knowledgeable and experienced personnel providing on-site observations will inevitably provide the best outcome.
- Data collected is synthesized by the ATIS team into easy-to-understand reports which consist of a description of existing conditions, recommended repairs, Code updates and deficiencies that need to be corrected with a follow-up plan. Our extensive library of template reports and deliverables are tailored to meet the field conditions and needs of each client through client engagement discussed elsewhere in this package.
- During on-site visits, elevators are subjected to evaluation using data collection devices to measure ride quality while door performance and run time are observed. This data will be merged with other performance determinants to inform the equipment performance metrics presented in the formal reports.

A hallmark of ATIS' approach is a culture of continuous improvement. All our processes and deliverables are continuously refined and improved through client and employee feedback. ATIS is involved in industry associations, safety organizations and the Code committees which promulgate the elevator and escalator safety codes. As such, we are at the cutting edge of technological advancements and safety issues developing within the industry. ATIS core business of vertical transportation inspection also puts us in the field for firsthand knowledge of the issues and contractor's approaches in the field. Being directly involved in these two sides of the elevator business position ATIS perfectly recognizes trends and responds to them with thoughtful and deliberate strategies for the best outcomes for our client's behalf.

Our constant interaction with the elevator contractors on the Code boards and in the field also gives us specialized insight on new products and what they plan to do with legacy products in the field, keeping ATIS at the forefront of obsolescence issues, schedules, available work arounds and highly technical solutions developed by the original equipment manufacturers.

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In the state of Texas we are watching Code requirements as the State of Texas deliberates the adoption of A17.1 - 2019 and A17.1 - 2022 (following the existing A17.1 - 2016 Applicable Code), and it's possible impact upon equipment owners contemplating the alteration (modernization) of their existing equipment. This forthcoming code adoption will have potential impact upon the budgetary planning and schedule of not only the elevator equipment, but also for the building related work, and emergency communication services available to the equipment owners.

DESCRIBE THE PRIME FIRM'S QUALITY ASSURANCE PROGRAM EXPLAINING THE METHOD USED AND HOW THE FIRM MAINTAINS QUALITY CONTROL DURING THE DEVELOPMENT OF DOCUMENTS AND QUALITY ASSURANCE DURING THE CONSULTING PHASE OF A PROJECT. *

Provide specific examples of how these techniques or procedures were used for any combination of three (3) projects listed in response to the section "Respondent's Performance on Past Representative Projects".

Quality Assurance and Quality Control: Once draft documents are developed, ATIS undertakes a rigorous Quality Assurance and Quality Control (QAQC) process utilizing the knowledge and skills of our team. The process is a structured system to ensure accurate, complete documents which adhere to internal standards based on an extensive library of templates developed and refined over decades.

As vertical transportation experts, Code and product knowledge is critical to providing thoughtful performance-based solutions to elevator problems and design. ATIS provides innovative and intelligent approaches to the industry's most difficult problems. Our system of internal review helps ensure that the best approach is offered and clearly explained. Initial discussion of equipment, issues and approach to correct is a collaborative effort between regional team members. Once a draft is prepared, a peer-to-peer internal review is conducted for completeness, accuracy, buildability, and adherence to proper Codes and standards. Once finalized documents received a technical review including validation of facts, data and calculations to ensure project specific and regulatory requirements are met. At this point there is a final proofread by available back of house resources and finalization for entry into the ATIS archive database. This ensures documents are properly stored and traceable. There is a final step of post implementation review for identification of recurring issues or areas for continuous improvement. At this point, templates can be refined, checklists modified, or training guidelines developed based on 'lessons learned' to ensure reliability, consistency and compliance. ATIS has found that an effective QAQC process not only improves our deliverables but enhances efficiency and productivity with clear workflow. We have found that these investments enhance our intellectual property to be the best in class.

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In the consulting phase of the project, ATIS has maintained a high satisfaction rate with our clients, through our initial efforts to prequalify the potential bidders for the projects ATIS administers and project manages, by keeping ourselves knowledgeable of the local market players. This ensures that ATIS is able to allocate the necessary time and resources to monitor the performance of the successful contractor during the project. ATIS consistently and continuously monitors the local and available contractors' capabilities, reputation, and qualifications as part of our prequalification processes.

Additionally, we establish the frequency or required project meetings between the equipment owners, ATIS, and the successful Contractor, and the frequency of progress reviews during the installation phase of the project, based upon the individual project needs, the required Scope of Work, the complexity of the project, and the Contractors capabilities within the local market. Having regular project meetings, and on-site progress reviews tailored to the project scope helps ensure that any potential issues realized and encountered during the project are addressed quickly, and helps us ensure that the project is kept on schedule.

DESCRIBE THE WAY IN WHICH YOUR FIRM DEVELOPS AND MAINTAINS WORK SCHEDULES AND TIMELINES TO COORDINATE WITH THE OWNER'S PROJECT SCHEDULE. *

For any combination of three (3) projects listed in response to question "Respondent's Performance on Past Representative Projects", provide examples of how these techniques were used.

ATIS Consulting and Inspection Team Qualifications and Experience:

As part of our engagement with our clients, we work with the equipment Owner/Client to first understand their needs and anticipated project schedule. At times, the Owner's desired project schedule may not always be possible to meet due to the project scope, and/or available material lead times. As such, our first priority and responsibility is to listen to and understand the Owner's needs and desires, then collect data on the equipment, and then advise the Owner on the available options based upon multiple factors. Factors to be considered include but are not limited to the unit characteristics and its configuration, access to the unit(s), material lead times, availability of local maintenance, repair, and modernization (alteration) teams within the local market, and other variables. At the current time, we are also taking potential costs and material lead time delays into consideration when discussing project schedules with our Clients, and/or the equipment Owner.

Some project schedules can be accelerated through the allocation of additional resources or acceptance of higher costs (overtime, or shift work). Others are limited due to the required operation of individual or grouped units for ADA or public usage needs. An example of this from prior projects, is when only two elevators out of thirteen were allowed to be taken out of service for

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modernization at a time. The building configuration broke the 13 elevators into three banks of 4 elevators (Red, Green, and Blue Banks), and a singular Service ("Freight") elevator. The City's budget and building traffic dictated the original and overall schedule, since only two elevators were able to be removed from service at any time. In our original consultations with the Owner (City), we provided available options based upon removal of 2 elevators at a time, 4 elevators at a time (two elevators in 2 banks), and three elevators at a time (one in each bank). Once the available options were presented, we advised our client on what each impact each option would have upon the project duration/schedule, and whether it would have an impact upon the projected budget. In general, extended project schedules can have an impact upon the total project cost, due to uncertainties in material lead times, and labor cost increases.

For Collin County, it would be important for ATIS, or any successful consultant to have a clear and concise understanding of both the internal and external drivers of the County's desired project schedule, and then find a way to achieve those goals. Having experience in similar projects is a benefit to any successful bidder. Included in the County's equipment list, are several elevators within secured areas (inmate elevators). Understanding the impact this will have upon the project schedule, and addressing this upfront with the County would be important for the successful Consultant. It is our responsibility as the Consultant, to have the technical and industry knowledge, expertise, experience, and feedback necessary to determine what schedules are possible without additional resources and costs, what might be possible with interventions and alternatives, and discuss the available options with the Owner.

Once the project timeline has been established, accepted, and finalized, ATIS utilizes all tools available to meet the desired project timeline or schedule. This can include technical resources (such as ATIS UpVate Anywhere App), it's Consultant's experience and expertise, local knowledge of the Contractor strengths and weaknesses, supplier relationships, drafting of equipment specifications, and proven project management processes to meet the desired goals.

There are many potential issues that can impact the project schedule. This can include contract clarifications or negotiations with regard to the contract for the successful bidder, submittal of required documents, review of submittals and samples, supplier or manufacturer delivery on ordered materials, etc...

ATIS takes a proactive role in ensuring that the Owner, Contractor, and ATIS (Consultant) meet their respective schedules as agreed upon.

ATIS UpVate Anywhere App:

ATIS developed a software app for internal use to capture data, assist in operations and streamline processes, detailed in the following.

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Inspection Planner: Provides a view of inspections that are due based on a set inspection frequency (e.g. a device can have CAT 1/Cat 5/Periodic/MCP inspections that are each due on a specified interval)

Scheduling: Each inspection or progress review can be scheduled from the inspection planner screen or by creating a new inspection. Scheduled inspection will automatically appear in the UpVate Anywhere mobile app for the specified inspector.

Mobile Data Collection App: Each inspector/mechanic will have a mobile app where they document an inspection or completion of tasks. Inspection and maintenance plans are based on checklists that need to be associated to the inspection or maintenance call at the time of scheduling.

Mobile: The mobile application is available for Android and Apple mobile devices. The feedback that we have received is that inspectors prefer to use the mobile apps on a phone vs. a large tablet.

Connectivity: UpVate Anywhere systems use APIs developed in Node.js to interface with any system that has exposed API endpoints, QuickBooks online, and Salesforce.com are examples.

Servers and Storage: We use cloud servers to power the UpVate Anywhere system, it provides scalability and most importantly security right out of the box.

Mobile Inspection App (cont'd): The mobile user will load the event into their device from a list of scheduled inspections when they have connectivity. They do not need connectivity until they are complete and "sync" the inspection. There is an "auto-sync" function that will check for a connection and sync every 10 minutes when a connection is available.

Signature Collection: When setting up an inspection, the user can specify if they would like to collect physical signatures on their device when an inspection is complete. This is flexible. The user can specify as many or as few signatures as they wish. The inspector then collects the signatures on their mobile device.

Flexible Checklist: An administrative user can set up templates to be used for different inspection types, e.g. an 'ME' checklist can be created with all the checklist items required to complete an ME inspection. The administrator will assign the checklist to the device when scheduling. The inspector will view only the associated checklist(s).

Collection of Device Info: The mobile user can collect information on each device, (type, capacity, speed, etc.) This data is stored with the device data once the data is synced.

Collection of Deficiency Info: The inspector can select (OK/NG/NA) for each checklist item. They are also able to collect photographs, audio notes, and text notes that are associated to the checklist item. The inspector is also able to select 'VC', which indicates that the item is a code violation vs. an item that is to be noted.

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DESCRIBE THE TYPES OF RECORDS, REPORTS, MONITORING SYSTEMS, AND INFORMATION MANAGEMENT SYSTEMS, WHICH YOUR FIRM USED IN THE MANAGEMENT OF THE PROJECTS LISTED ABOVE.*

Describe how you used these systems for any combination of three (3) projects listed in response to question "Respondent's Performance on Past Representative Projects".

Custom Reporting: The data collected is reported in a standard format exported as a PDF or as a Word document. We can format this data in any report format that is provided and will be downloaded via PDF or Word.

Reinspections: There are 2 different types of reinspection. Users can specify if they would like to view previous items while performing a new inspection. Users can also specify if they would like to simply view the open items and mark them as "done".

User Types

- *Admin:* User has access to perform all functions for a group.
- *Supervisor:* Has access to all functions except user management within a group.
- *Inspector:* Can only view and edit inspections that have been assigned to them.
- *Subcontractor:* User belongs to a different company account, however, can view/edit inspections that have been assigned to them.
- *Client Access:* User has access to reports, action follow-up notes and any other client required access.

Define Maintenance Control Plan: The UpVate system will generate, based on various metrics, the maintenance control plan per code requirements. This maintenance control plan is then loaded for execution.

Track Maintenance Activities: Once the plan is developed, the elevator provider is given a set of tasks based on the maintenance control plan. The tasks are then presented to the service technician via a mobile app or integration with the service company's enterprise system. These tasks are then closed out by the technician.

Report on Maintenance Compliance: At any time, the maintenance task data is then reported on. The report contains the plan and when the task was completed. This allows the client user to manage a list of open tasks for compliance with contracted services.

Training: Staff will provide training for each office/region prior to deployment:

- *Video Conference:* Training will be accomplished via Video Conference, each office/region will receive 2 training sessions per user type.
- *Video Tutorials:* Where necessary the UpVate staff will create video tutorials for ongoing reference.
- *On-site Training:* If necessary, we are willing to provide on-site training for an additional fee.

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Armed with the knowledge from these various sources, ATIS uses this information in two ways, for enhancement of intellectual property and training:

Training: Safety is not only one of our core values at ATIS, but every one of us in this industry has a personal story of a friend, a family member, or co-worker who was severely injured on the job. Industry is dangerous and training builds awareness. There is nothing more important to than ensuring our teams are armed with the knowledge, the tools, and the confidence to always put safety first. To this end ATIS uses an extensive database of information distributed via our on-line training platform Dayforce. Modules are developed and disseminated throughout the company to keep employees aware of the best practices for their jobs and efforts. This information also resides within a company database which is constantly updated with product and technology information as well. In response to the questionable quality of elevator contractors' maintenance programs, ATIS developed our Total Elevator Asset Management (TEAM) program. In short, this project management for elevator service has a group of support staff who also provide details for changes in the industry, technological advances and new products which may help our clients. This group of TEAM account managers dedicated also maintains data from product information, which is collected in their daily project management activities, gathered from our inspectors in the field or garnered from our involvement on Code committees and task forces. While this data is readily available, it is distributed through regional seminars, town hall meetings and local toolbox talks to help keep a consistent message for different types of equipment and visibility on the latest products and trends.

DESCRIBE HOW YOU PLAN TO ENSURE CONTINUITY OF PROJECT OBJECTIVES THAT MEETS THE OWNER'S REQUIREMENTS.*

Statement of Understanding and Approach

Per RFQ 2025-137, consulting services will include full-service elevator / escalator consulting services to lead all phases of elevator / escalator capital improvement projects in new construction or renovation projects, as well as completing multi-year service agreements and performance inspections.

We believe that we offer a strong knowledge base and experience that aligns directly to the scope of work required for this project as outlined in RFQ 2025-137, making ATIS the most qualified to perform the services for this project.

ATIS believes a successful approach to providing Collin County with professional consulting services requires a complete understanding of the equipment condition, age, manufacturer but also as important as Collin County's existing service agreement with its elevator maintenance contractor.

These are critical aspects for the obvious reasons of anticipated equipment longevity and quality, but the service agreement sets the expectations for the level of maintenance, repairs and accountability of the elevator contractor. A strong service agreement will

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enhance the net useful life of vertical transportation equipment, while an ambiguous or vague scope of work can drive up costs and reduce the anticipated useful life of even the best quality equipment.

Upon award and execution of a contract between Collin County and ATIS, we would first begin gathering equipment and contract data from the County, and the County's contract elevator service provider. This is essential in gaining an understanding of the existing equipment profile, and service history, Inspection and Testing schedule, service issues, maintenance frequency, modular upgrades (if any have been performed since the original installation), and the recent callback history for the units.

If successful, ATIS will then perform a thorough review of the maintenance scope of work (SOW), and contractual requirements of the service agreement, prior to the performance of an on-site maintenance evaluation. With a clear understanding of the requirements of the service agreement, the maintenance evaluation can focus on the performance of the elevator contractor versus the required SOW of the Service Agreement. Compliance with Code and/or authority having jurisdiction (AHJ) requirements, consistency, quality of the work, and the proper performance and documentation of Code required tasks and services with on-site, and digital records maintained by the Service Contractor will be the focus. Our evaluation would also include performance metrics of the equipment to AHJ and ADA requirements. The performance metrics would include operational criteria such as rated speed, floor to floor times, door opening and closing speeds and door closing force, etc.

Any deficiencies or violations would be identified, and a list compiled for remediation by the service contractor, or Owner (typically building issues like fire alarm initiating devices, telecommunications issues, sump pumps, etc.) for correction and follow up. Once deficiency lists have been communicated to the responsible parties, ATIS would assist in the verification of corrected deficiencies through an on-site follow-up survey. The follow-up survey would be scheduled according to the required timelines necessary for correction of the specific deficiency.

As part of our review of the contractual documents between Collin County and its Elevator Service Contractor, we would identify areas or items for clarification, or improvement, so that future RFPs issued for elevator service would incorporate changes that would either be necessary to meet code or AHJ requirements, to improve operational performance and reduce potential violations through incorporation of specific tasks to the scope of work/maintenance specification document.

Included in the ATIS maintenance evaluation would be our opinion on age and anticipated life cycle remaining for each unit. This will allow the County to plan for either modular upgrades or full modernization/alteration to renew net useful life. For newer units, this review also serves as a benchmark for service quality, when periodic maintenance evaluations are performed on the unit(s), and any changes to the projected useful life cycle expectations can be utilized for corrective measures with the service contractor or utilized as

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part of the Collin County's budgeting process. Helping the County make informed decisions about short-term and long-term investments in vertical transportation, ensuring safety, efficiency, compliance with industry standards and Codes.

ATIS is committed to delivering timely and efficient projects. We understand the importance of adhering to our client's schedule and the deadline in any assessments performed. Our experts will work diligently to ensure that a comprehensive assessment report, encompassing all mentioned elements, is delivered within the agreed-upon timeframe, as well as providing the specifications that will be used for RFP bidding purposes. We recognize the significance of providing actionable information promptly to facilitate informed decision-making on elevator maintenance and improvements.

Upon written notice of award, ATIS will submit the following documentation to Collin County:

- Certificate of insurance.
- Any signed contracts.
- Any other supporting documents required.

If we are fortunate enough to be awarded a notice to proceed from Collin County, ATIS will utilize the following internal resources to complete the assessments of the vertical transportation. We anticipate the following general outline for the surveys and reporting:

- ATIS will provide the experienced elevator consultant team necessary to conduct field surveys of each piece of equipment and collect all required data. The survey and data collection portion of this scope will be scheduled according to a kickoff meeting with the County and designated stakeholders to set clear expectations, goals and timelines.

ATIS' approach to a complex engagement with Collin County will consist of four main pillars which we have found successful on similarly sized projects:

a) Defined Consulting team roles and responsibilities

- Introduction of onsite team of experienced consultants.
- Introduction of project management contact.
- Introduction of executive support members.

b) Strong Project Management of all consulting activities:

- Discussion of overall Scheduling of onsite meetings as outline in the scope

Detailed review of all equipment survey criteria.

- Outlining formal meetings with Client and Contractors as required.
- Discussing expectations for detailed reports of the existing conditions of the elevator equipment outlining current condition, near

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term maintenance or repair requirements, and life cycle information.

- Detailing follow up activities, meeting minutes, site review reports and action item tasking as necessary.

c) Tactical data collection

- All onsite visits are documented via a mobile data collection system and reports are created for each visit. The report shall consist of an overview of the equipment, ATIS' observations and any deficiencies that need to be corrected.

d) Client Reporting

- The reports will outline the following:

i. ATIS' onsite observations.

ii. Repair and maintenance recommendations.

iii. Capital planning data with budgets and anticipated timing.

iv. Maintenance and repair deficiencies list with confirmation request.

v. Modernization action items as appropriate.

vi. Photographic documentation.

ATIS' approach to the Collin County project will be based on our extensive experience with mid and large sized portfolios to develop a customized consulting scope of work based on feedback and interviews with the County and appropriate stakeholders. Our experience has informed this approach that it is incumbent upon the ATIS team understanding the perspective, goals and expectations of our clients in order to create the partnership to develop the scope of work to exceed the needs of our clients. While our goal in our moto is to help make the world of vertical transportation safer, we also strive to delight our clients and surpass their expectations.

DESCRIBE THE PROJECT TEAM'S APPROACH TO ASSURING TIMELY COMPLETION OF PROJECTS, INCLUDING METHODS YOU WILL USE FOR SCHEDULE RECOVERY IF NECESSARY.*

We use UpVate as described in the response to the previous question. Additionally, depending upon the source of the delay or impact to the project schedule, ATIS implements differing methods for schedule recovery, if required.

ATIS believes that one of the most important ways to assure the timely completion of projects, is to stay aware of where the Owner, Contractor, and ATIS are within the project, and where each entity's responsibilities lay. Identifying potential issues upfront, and catching delays early is important in initializing remedial actions for schedule recovery before significant delays can develop. Open and frequent communications between all parties is important in maintaining the project schedule as agreed upon.

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For potential delays due to contract negotiations between the Owner and successful Contractor (Installer), ATIS can sometimes accelerate its review of required submittal documents, shop drawings, samples, and fixture drawings, thereby recovering some time. For longer project delays (as in the City of Dallas project Andre Chionh was the consultant on, where Covid played a part in material and safety process related delays) where a schedule delay is unavoidable, we explore every possibility available, and present the Owner with options and cost projections if applicable (based upon the contract terms between the elevator contractor and Owner).

Where schedule recovery falls under the responsibility of the elevator contractor to remediate, ATIS utilizes the Contract terms to ensure that all available contractual remedies are utilized to incentivize the contractor to make corrective measures without having to initiate formal legal proceedings. Where opportunities exist, ATIS has also supported the local contractor efforts for schedule recovery, through intervention with the contractor's regional, national, or corporate leadership.

Where 3rd party supplier or manufacturers have been responsible for the delay, ATIS has also in the past successfully intervened with the manufacturer to aid in schedule recovery. There are times when factors outside of the ability of the Owner, or Elevator Contractor to control can affect the project schedule. Storms, floods, or even vehicular crashes can be potential sources of material delays. Where these delays occur, ATIS provides available options that can may be considered, and all options are discussed with the Owner, and how the options may assist in schedule recovery.

DESCRIBE HOW YOU TRACK OWNER INPUT AND REVIEW COMMENTS TO CONFIRM THAT THEY HAVE BEEN ADDRESSED.*

Provide examples of reports/logs used for tracking response to and closure on Owner comments.

Track_Owner_input_and_review_comments.pdf

6. RESPONDENT'S ABILITY TO IDENTIFY AND RESOLVE PROBLEMS ON PAST PROJECTS

DESCRIBE YOUR UNDERSTANDING OF THE ADMINISTRATIVE CHALLENGES AND OPPORTUNITIES ASSOCIATED WITH PROVIDING CONSULTING SERVICES FOR THE ASSIGNED ELEVATOR/ESCALATOR MODERNIZATION AND YOUR STRATEGY FOR RESOLVING THESE ISSUES.*

ATIS does not have any administrative challenges associated with providing Consulting services for the assigned elevator/escalator modernization itself. However, from past experience in working various City governments and Federal Institutions on modernization projects, the Elevator Contractors sometimes face administrative challenges due to the project schedule surpassing a calendar

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year. Different companies have their own individual challenges, especially when the project schedule can potentially even span two calendar years. We can overcome some of the administrative challenges by working with both the Owner and the Successful Contractor, during the negotiation phase of the contract execution, and our recommended solution(s) will vary depending upon the nature of the issues presented by the successful contractor.

An administrative challenge in the generation of specifications can be found in the creation of a level playing field when it comes to the escalators. Some companies are not able to provide a modernization option for the escalators (whereby the existing escalator truss is retained), based upon specific escalator models. As such, the playing field may not be completely level for all parties. Some companies are only able to offer a "Rip Out And Replace" approach to the escalator "modernization" which would essentially be a "new installation" option that includes the removal of the existing escalator truss.

One of the ways in which ATIS has resolved some of these challenges with the escalators is to separate the escalator projects from the elevator projects. This allows ATIS to discuss the benefits of the rip out and replace approach versus the modernization approach with the Owner first. We continually monitor the capabilities of each major elevator company with regard to escalator modernization and escalator replacement options for the smaller elevator contractors. Keeping both elevator and escalator projects combined can adversely affect the bid submittal pricing, and exclude smaller independent companies from participating in the RFP process.

WHAT DO YOU PERCEIVE ARE THE CRITICAL ISSUES FOR THIS PROJECT?*

Critical Issue 1. Time. Specifically, Material lead time and Installation time, for the respective equipment. Current material lead times ranges between 14 to 24 weeks (depending upon unit type, and specifications for Elevators and Escalators). As a lot of the major elevator equipment is either wholly manufactured overseas, or relies upon components sourced from overseas suppliers, the material lead times are anticipated to increase due to tariffs that may potentially be imposed upon supplier countries. This is also projected to affect costs.

Critical Issue 2. Access to secure areas may also impact the projected installation time for the project. For secure areas, some of our institutional and governmental clients have required that the installation teams and personnel involved in the project have to pass background checks. If this is a requirement for this project, ATIS will need to know up front, prior to release of the bid documents to the perspective bidders, so that it can be incorporated into the bid documents. Larger elevator contractors have an advantage in this area, as they have a number of potential installation teams to choose from, in coordinating the staffing for this project.

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UNDERSTANDING SCHEDULE LIMITATIONS PROVIDE AN ANALYSIS OF THE OWNER'S PROJECT PLANNING SCHEDULE AND DESCRIBE HOW YOU PLAN TO DEVELOP AND COMMUNICATE DESIGN, SCOPE, AND BUDGET OPTIONS IN A FORM THAT WILL QUICKLY FACILITATE THE OWNER'S DECISION MAKING.*

Sample_Project_Timeline.pdf

DESCRIBE THE PROJECT TEAM'S EXPERIENCE WITH MODERNIZATION AND CONSULTING PROJECTS.*

Process and Procedures – Design Approach

ATIS takes a methodical and thoughtful approach to each project based in engineering design. Beginning with understanding our client's and their stakeholders' needs, we use our technical experts and database of equipment information to clearly define the problem at hand and understand the engineering challenge presented. This is typically documented through a meeting or conversation bolstered by our statement of understanding. Through this discussion process, concepts and feasibility of the initial solutions are part of the brainstorm session where ideas are vetted. The primary consultant is tasked with narrowing down the concepts or developing the best solutions for the intended outcome. At this time, draft documentation is produced to assemble a clear and measurable scope of work based on the knowledge, assessment and experience which is correlated to the expected performance of the vertical transportation system, subsystem or modernization. At this point an understanding of how they build the solution as well as the contractor's role in the execution of their duties in the selected approach is detailed. At this point, documents are finalized and subjected to internal quality requirements.

Modernization presents a special challenge our experienced colleagues enjoy. Specialized knowledge of equipment, Codes, construction and installation practices helps inform intelligent options for interfacing the old with the new and identification where parts and subsystems are better refurbished, reused or replaced. Energy efficient designs are one such area of expertise. While the physics of elevator load and speed are consistent, solutions based in technological advances like gearless machine efficiency over geared machine friction loss, regenerative aspects of motors and even the most basic energy efficient lighting design helps inform every ATIS design solution. Energy efficient design practices also must be rooted in high technology guidelines like the Institute of Electrical and Electronics Engineers standard (IEEE). Bringing this depth of knowledge, experience and efforts to stay on the cutting edge of technology helps ATIS provide the most advanced problem solving.

Once a design has been vetted, developed and presented, an internal estimate is prepared to help our client's understand the value of the work to be performed. While budgeting has been rather challenging and unpredictable due to several factors including supply chain issues, raw material prices, labor availability, global demand and high profit expectations by contractors, we have found that our good working relationships with the elevator contractors has allowed us to keep pace with these changing targets. With this

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understanding, we have encouraged our front-line consultants to engage regularly with contractors in their region to understand these nuances and report them back to monitor regional and global trends. Understanding the budgeting pressures helps ATIS continually evolve our scope documents to provide limits to escalations, shipping charges and the ever-changing creative extra charges the contractors dream up. By documenting the expectations for allowable extra billing for scope changes, acceptable mark up and schedule expectations, ATIS provides detailed and measurable expectations for every project.

Coupling this information with the project schedule, milestone expectation and reporting requirements, the ATIS specifications help ensure on-time projects with few or no change orders. By a team approach, ATIS monitors the goals and objectives of each project. An in-house project plan is tracked through our NetSuite software modules also used to define roles and responsibilities of each team member. As tasks are assigned for shop drawing review, review of payment applications, RFI's etc. the project manager coordinates and organizes the team's schedule and deliverables. Through regular check-ups, internal as well as external meetings and clear communication, obstacles can be addressed, adjustments planned for, and the schedule maintained. When it comes to managing elevator contractors, in some cases the use of liquidated damages or bonus programs for on-time and early delivery has been used for contractor motivation.

The resulting 'feedback loop' helps ensure projects stay on schedule but also are delivered with the highest quality and lowest number of defects. Detailed construction administration through regular site visits and evaluation of work practices on-site help ensure that issues are addressed before becoming problems. Site review documentation is submitted in a timely manner with appropriate detail and photographic support to ensure that any issue is clearly presented with a solution for correction. This level of detail results in project delivery for the greatest potential life cycle.

Our feedback loop of project management results in high quality projects with minimal change orders and defects to be turned over for regular use. If chosen by our client, a detailed maintenance specification can be provided to maximize the life of the equipment after the warranty services. ATIS' knowledge of each manufacturer's inspection guidelines, maintenance control program (MCP) and the application of these documents ensures a maintenance program with measurable performance criteria and thorough coverage in favor of the equipment owner. We have tracked a trend in the industry toward elevator contractors reducing equipment coverage, blurring expectations and eliminating accountability. ATIS warranty, interim and post turnover maintenance specifications strive to have the contractors deliver a proactive and preventative maintenance approach versus the reactive type of maintenance the industry is embracing in their efforts to maximize profit for the maintenance providers.

Quality Assurance and Quality Control: Once draft documents are developed, ATIS undertakes a rigorous Quality Assurance and Quality Control (QAQC) process utilizing the knowledge and skills of our team. The process is a structured system to ensure accurate,

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complete documents which adhere to internal standards based on an extensive library of templates developed and refined over decades.

As vertical transportation experts, Code and product knowledge is critical to providing thoughtful performance-based solutions to elevator problems and design. ATIS provides innovative and intelligent approaches to the industry's most difficult problems. Our system of internal review helps ensure that the best approach is offered and clearly explained. Initial discussion of equipment, issues and approach to correct is a collaborative effort between regional team members. Once a draft is prepared, a peer-to-peer internal review is conducted for completeness, accuracy, buildability, and adherence to proper Codes and standards. Once finalized documents received a technical review including validation of facts, data and calculations to ensure project specific and regulatory requirements are met. At this point there is a final proofread by available back of house resources and finalization for entry into the ATIS archive database. This ensures documents are properly stored and traceable. There is a final step of post implementation review for identification of recurring issues or areas for continuous improvement. At this point, templates can be refined, checklists modified, or training guidelines developed based on 'lessons learned' to ensure reliability, consistency and compliance. ATIS has found that an effective QAQC process not only improves our deliverables but enhances efficiency and productivity with clear workflow. We have found that these investments enhance our intellectual property to be the best in class.

FOR ANY THREE (3) OF THE PROJECTS LISTED IN RESPONSE TO QUESTION "RESPONDENT'S PERFORMANCE ON PAST REPRESENTATIVE PROJECTS", DESCRIBE ANY CONFLICTS WITH THE OWNER, CONTRACTOR, OR SUBCONTRACTORS, AND DESCRIBE THE METHODS YOUR FIRM USED TO RESOLVE THOSE CONFLICTS.*

No conflicts with the projects we listed. We make sure to preplan our projects upfront to prevent conflict. The only issue might arise when a contractor or owner fails to meet their timeline on deliverables. In that case we would work with the owner or contractor to make adjustments via overtime and/or additional costs.

7. VENDOR RESPONSES

NOTICE*

Collin County exclusively uses OpenGov eProcurement Portal for the notification and dissemination of all solicitations. The receipt of solicitations through any other means may result in your receipt of incomplete specifications and/or addendums which could

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ultimately render your bid/proposal non-compliant. Collin County accepts no responsibility for the receipt and/or notification of solicitations through any other means.

Confirmed

CONTACT INFORMATION*

List the contact name, email address and phone number of the main person(s) Collin County should contact in reference to this solicitation. Contact(s) shall be duly authorized. List authorized by the company, corporation, firm, partnership or individual to respond to any questions, clarification, and/or offers in response to this solicitation.

Jay Sitzmann, jsitzmann@atis.com, 314-396-7894.

Andre Chionh, achionh@atis.com, (469) 546-9975

EXCEPTIONS*

Do you take exception to the specifications?

No

INSURANCE ACKNOWLEDGEMENT*

I understand that the insurance requirements of this solicitation are required and are included in the submitted pricing. A certificate of insurance shall be submitted to the Purchasing department if I am awarded all or a portion of the resulting contract.

Confirmed

SUBCONTRACTORS*

State the business name of all subcontractors and the type of work they will be performing under this contract. If you are fully qualified to self-perform the entire contract, please respond with "Not Applicable-Self Perform".

Not Applicable-Self Perform

REFERENCE NO. 1*

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List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

Agency #1	University of Alabama at Birmingham		
Address	619 19th St. South		
City, State, ZIP	Birmingham, AL 35294		
Contact Person	Rod Bizzell		
E-mail	rbizzell@uab.edu	Phone:	205-934-8351
Date(s) of Service	2023-2024		
Type of Service	Equipment assessment of 330 units on the university and hospital campus. Reports detailing current condition and capital planning.		

REFERENCE NO. 2*

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

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It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

Agency #2	University of Florida - Facilities	
Address	245 Gale Lemerand	
City, State, ZIP	Gainseville, Florida	
Contact Person	Jocelyn Hickey	
E-mail	j.hickey@ucf.edu	Phone: 352-273-4000
Date(s) of Service	2020-Present	
Type of Service	Various vertical transportation projects; inspections, recent new design specifications and construction management of 7 elevators	

REFERENCE NO. 3*

List a company or governmental agency, other than Collin County, where these same/like products/services, as stated herein, have been provided. Texas references are preferred.

Include the following: Company/Entity, Contact, Address, City/State/Zip, Phone, and E-Mail.

It is the responsibility of the Bidder/Proposer to ensure submitted references will be responsive to the County's requests. The County reserves the right to contact references other than those listed, and to consider any information acquired from all references during the evaluation process.

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Agency #3	Pinellas County		
Address	509 South East Ave.		
City, State, ZIP	Clearwater, Florida		
Contact Person	Michael Presti, LEED AP		
E-mail	mpreseti@pinellas.gov	Phone:	727-464-4074
Date(s) of Service	2020-2022		
Type of Service	Vertical transportation consulting for freight elevator modernization		

DEBARMENT CERTIFICATIONS*

I certify that neither my company nor an owner or principal of my company has been debarred, suspended or otherwise made ineligible for participation in Federal Assistance programs under Executive Order 12549, "Debarment and Suspension," as described in the Federal Register and Rules and Regulations.

Confirmed

IMMIGRATION AND REFORM ACT*

I declare and affirm that my company is in compliance with the Immigration and Reform Act of 1986 and all employees are legally eligible to work in the United States of America. I further understand and acknowledge that any non-compliance with the Immigration and Reform Act of 1986 at any time during the term of this contract will render the contract voidable by Collin County.

Confirmed

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DISCLOSURE OF CERTAIN RELATIONSHIPS*

Chapter 176 of the Texas Local Government Code requires that any vendor considering doing business with a local government entity disclose the vendor's affiliation or business relationship that might cause a conflict of interest with a local government entity. Subchapter 6 of the code requires a vendor to file a conflict of interest questionnaire (CIQ) if a conflict exists. By law this questionnaire must be filed with the records administrator of Collin County no later than the 7th business day after the date the vendor becomes aware of an event that requires the statement to be filed. A vendor commits an offense if the vendor knowingly violates the code. An offense under this section is a misdemeanor. By submitting a response to this request, the vendor represents that it is in compliance with the requirements of Chapter 176 of the Texas Local Government Code. Please send completed forms to the Collin County County Clerk's Office located at 2300 Bloomdale Rd., Suite 2104, McKinney, TX 75071.

Confirmed

ANTI-COLLUSION STATEMENT*

Bidder certifies that its Bid/Proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a Bid/Proposal for the same materials, services, supplies, or equipment and is in all respects fair and without collusion or fraud. No premiums, rebates or gratuities permitted; either with, prior to, or after any delivery of material or provision of services. Any such violation may result in Agreement cancellation, return of materials or discontinuation of services and the possible removal from bidders list.

Confirmed

DISCLOSURE OF INTERESTED PARTIES*

Section 2252.908 of the Texas Government Code requires a business entity entering into certain contracts with a governmental entity to file with the governmental entity a disclosure of interested parties at the time the business entity submits the signed contract to the governmental entity. Section 2252.908 requires the disclosure form (Form 1295) to be signed by the authorized agent of the contracting business entity, acknowledging that the disclosure is made under oath and under penalty of perjury. Section 2252.908 applies only to a contract that requires an action or vote by the governing body of the governmental entity before the contract may be signed or has a value of at least \$1 million. Section 2252.908 provides definitions of certain terms occurring in the section. Section 2252.908 applies only to a contract entered into on or after January 1, 2016.

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Confirmed

NOTIFICATION SURVEY*

In order to better serve our offerors, the Collin County Purchasing Department is conducting the following survey. We appreciate your time and effort expended to submit your bid. Should you have any questions or require more information please call (972) 548-4165. How did you receive notice of this request?

BidPrime

CRITICAL INFRASTRUCTURE AFFIRMATION*

Pursuant to section 2274.0102 of the Texas Government Code, Respondent certifies that neither it nor its parent company, nor any affiliate of Respondent or its parent company, is: (1) majority owned or controlled by citizens or governmental entities of China, Iran, North Korea, Russia, or any other country designated by the Governor under Government Code Section 2274.0103, or (2) headquartered in any of those countries.

Confirmed

ENERGY COMPANY BOYCOTTS*

Pursuant to Section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent represents and warrants that: (1) it does not, and will not for the duration of the contract, boycott energy companies, and (2) will not boycott energy companies during the term of the contract. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency.

Confirmed

FIREARM ENTITIES AND TRADE ASSOCIATIONS DISCRIMINATION*

Pursuant to section 2274.002 of the Texas Government Code, should the contract have a value of \$100,000 or more and the company employs 10 or more full-time employees, Respondent verifies that:

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1. It does not have a practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association and (2) will not discriminate during the term of the contract against a firearm entity or firearm trade association. If circumstances relevant to this provision change during the course of the contract, Respondent shall promptly notify Agency.

Confirmed

W-9*

Please upload your W-9 Form

ATIS_W9_Form_2025.pdf

INFORMATION REGARDING CONFLICT OF INTEREST*

During the 79th Legislative Session, House Bill 914 was signed into law effective September 1, 2015, which added Chapter 176 to the Texas Local Government Code. Recent changes have been made to Chapter 176 pursuant to HB23, which passed the

84th Legislative Session. Chapter 176 mandates the public disclosure of certain information concerning persons doing business or seeking to do business with Collin County, including family, business, and financial relationships such persons may have with Collin County officers or employees involved in the planning, recommending, selecting and contracting of a vendor for this procurement.

For a copy of Form CIQ and CIS: <https://www.ethics.state.tx.us/forms/conflict/>

The vendor acknowledges by doing business or seeking to do business with Collin County that they have been notified of the requirements under Chapter 176 of the Texas Local Government Code and that they are solely responsible for complying with the terms and conditions therein. Furthermore, any individual or business entity seeking to do business with Collin County who does not comply with this practice may risk award consideration of any County contract.

For a listing of current Collin County Officers: <https://www.collincountytexas.gov/Contact/county-officials>

At the time of this solicitation being released, the following are known to be involved in the planning, recommending, selecting, and/or contracting for the attached procurement:

Department:

Rick Monk-Director of Facilities

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Ricky Thomas-Superintendent Facilities

Ian Capps-Facilities Tech Coordinator

David Rogers-Facilities Tech Coordinator

Jayson Hopper-Facilities Tech Coordinator

Purchasing:

Michelle Charnoski, NIGP-CPP, CPPB – Purchasing Agent

Marci Chrismon, CPPB – Assistant Purchasing Agent

Cory Rogers-Senior Buyer

Commissioners Court:

Chris Hill – County Judge

Susan Fletcher – Commissioner Precinct No. 1

Cheryl Williams – Commissioner Precinct No. 2

Darrell Hale – Commissioner Precinct No. 3

Duncan Webb – Commissioner Precinct No. 4

*Response required

Complete the CIQ attachment and upload.

CIQ.pdf

CONFIRMATION OF SUBMITTAL - PLEASE INITIAL*

This execution of offer must be completed (initialed) and returned (if submitting manually) with the respondent's qualifications. Failure to complete this execution of offer with the qualifications may result in rejection of the qualifications. Submitting a false statement may void the submitted qualifications or any agreements or other contractual arrangements, which may result from the

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submission of respondent's qualifications. A false certification shall be deemed a material breach of contract and, at owner's option, may result in termination of any resulting contract or purchase order.

REPRESENTATIONS By confirming below, Respondent represents and warrants that:

1. the Qualifications and all statements and information prepared and submitted in response to this RFQ are current, complete, true and correct;
2. it is not given, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount trip, favor or service to a public servant in connection with the submitted Qualifications or any subsequent proposal. Failure to sign below, or signing a false statement, may void the Response or any resulting contracts at the Owner's option, and the Respondent may be removed from all future proposal lists at this County;
3. the individual signing this document and the documents made part of the RFQ is authorized to sign such documents on behalf of the Respondent and to bind the Respondent under any contract which may result from the submission of the Response;
4. no relationship, whether as a relative, business associate, by capital funding agreement or by any other such kinship exists between Respondent and an employee of Collin County, Texas
5. no compensation has been received for participation in the preparation of this RFQ (ref. Section 2155.004 Texas Government Code);
6. Respondent complies with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action;
7. to the best of its knowledge, no member Collin County Commissioners Court or Elected official has a financial interest, directly or indirectly, in the Project; and
8. each individual or business entity proposed by Respondent as a member of its team that will engage in the practice of engineering will be selected based on demonstrated competence and qualifications only.

Maximum response length: 5 characters

JS

OFFEROR ACKNOWLEDGMENT*

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RFQ No. 2025-137

Elevator and Escalator Vertical Transportation Consulting

Offeror acknowledges that they understand the specifications, any and all addenda, agrees to the terms and conditions, and can provide the minimum requirements stated herein. Offeror acknowledges they have read the document in its entirety and is familiar with local conditions under which work is to be performed and will be responsible for any and all errors in the statement submitted resulting from Offeror's failure to do so. If statement is accepted, offeror further certifies and agrees to furnish any and all services upon conditions in the specifications of the Statement of Qualifications.

Confirmed

[ATIS ELEVATOR INSPECTIONS, LLC] RESPONSE DOCUMENT REPORT

Request For Qualification - Elevator and Escalator Vertical Transportation Consulting

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EXHIBIT B PROVIDER RESPONSE



Richard Cherry

Signature of Inspector

E. H.

Program Administrator

Qualified Elevator Inspector Training Fund

This is to certify that

Richard Cherry

**is qualified as an
Elevator Inspector**

Certification #: E001035

Effective Date: 07-29-2016

Expiration Date: 07-31-2025

RH HQ

Jermaine P. B.

CC Chair

STATE OF TEXAS

RICHARD DENNIS CHERRY

ELEVATOR INSPECTOR



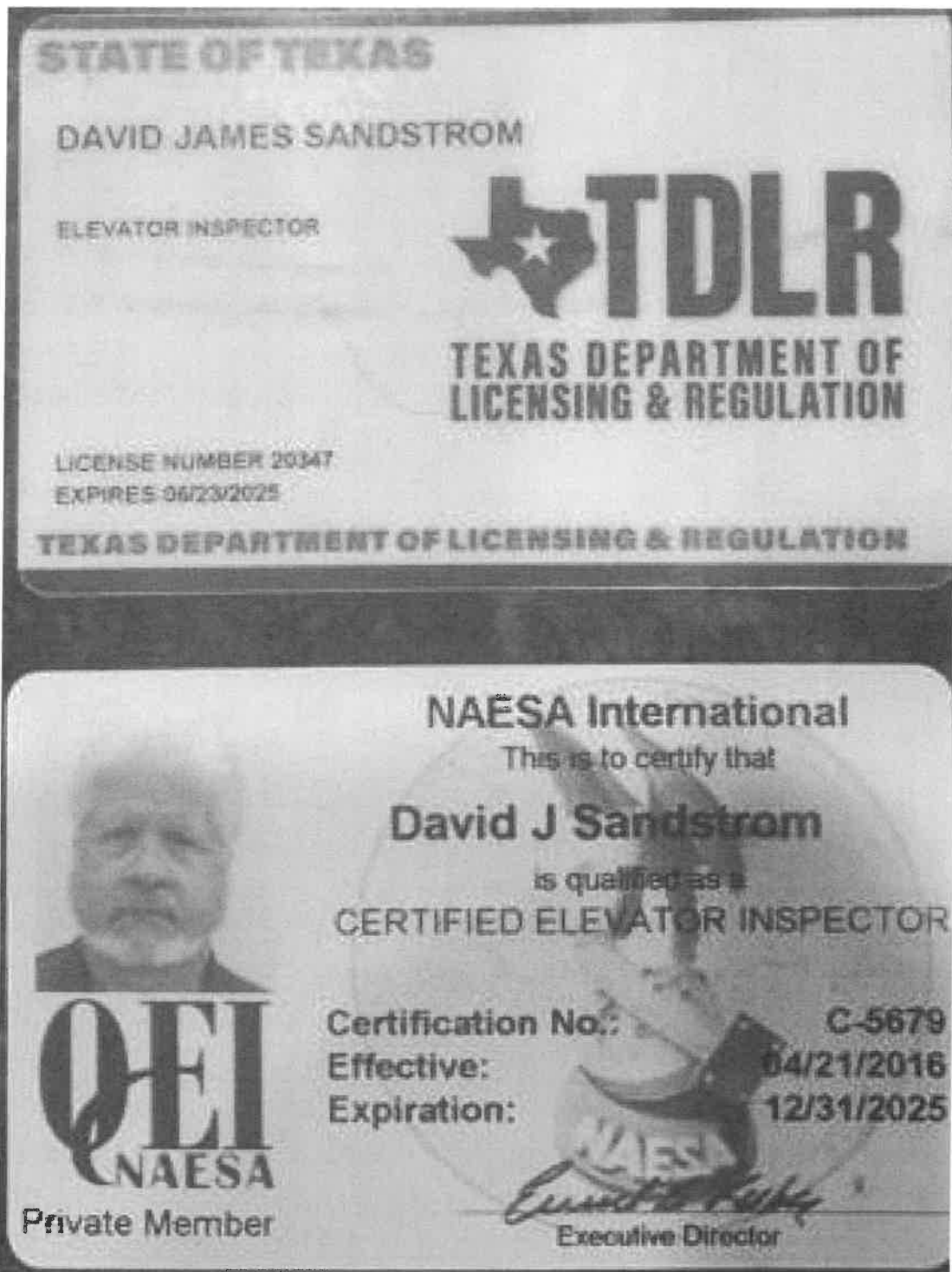
**TEXAS DEPARTMENT OF
LICENSING & REGULATION**

LICENSE NUMBER 20361

EXPIRES 09/02/2025

TEXAS DEPARTMENT OF LICENSING & REGULATION

EXHIBIT B PROVIDER RESPONSE





Collin County
ATIS Elevator Consulting Team
Key Personnel Org Chart

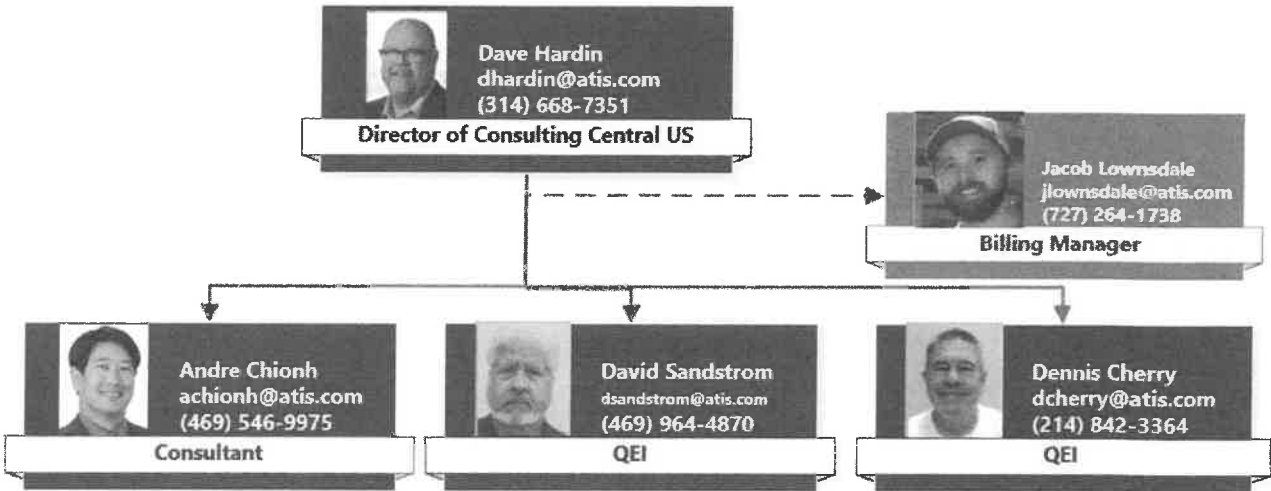


EXHIBIT B PROVIDER RESPONSE



EXPERT CONSULTANT

ANDRE CHIONH Senior Associate

Starting as a Senior Associate with ATIS in 2023, Andre has over 26 years of elevator industry experience, working in Operations, National Account Management, Modernization, Repair, and Maintenance Sales for KONE, Otis, and TK Elevator. He also served as the managing partner for QEI Solutions, LLC, providing Vertical Transportation consulting services and inspections to clients nationwide.

To round out his elevator industry experience, Andre also worked on the supply side of the elevator industry, providing 3rd party Elevator and Escalator part solutions to the major OEMs as well as the independent elevator companies. His customer accounts included clients located in Australia, Puerto Rico, South America, as well as from within all major cities within the US domestic market.

Andre's vertical transportation consulting experience includes work with municipalities, federal buildings, correctional facilities, FEMA, food processing facilities, downtown office buildings, malls, commercial buildings, schools, cinemas, universities, and healthcare facilities.

EDUCATION

- BAJ – Indiana University, Bloomington

AFFILIATIONS/CERTIFICATIONS

- 26 years of industry experience
- 1 year with ATIS



Responsible for Vertical Transportation Services:

- Modernization
- Due Diligence
- Condition and Maintenance Evaluations
- Vertical Transportation Analysis
- Construction Services
- Project Documents

DIRECT: 214-471-0062

EMAIL: achionh@atis.com



 An ATIS Elevator Advisor on your side

CONTACT: +1 855 755 ATIS

[ATIS.com](https://www.atis.com)

EXPERT CONSULTANT

DAVE HARDIN

Director of Consulting - Central

Dave serves as one of our consulting directors who oversee all ATIS elevator projects and consultants in the central region. He has worked in the elevator industry since 1995 and has been consulting since 2002. With his extensive background in design development, specification preparation, and construction management, Dave is exceptionally skilled in advising clients on equipment renovation and installation, and in preparing maintenance agreements.

Prior to joining ATIS, Dave was a principal and consultant for K. H. Lemp Elevator Consultant Co. He also spent several years managing sales for ThyssenKrupp Elevator. And with his Qualified Elevator Inspection (QEI) certification and elevator inspection licenses in Missouri and Illinois, Dave brings invaluable experience inspecting and certifying elevators for safety and compliance.

EDUCATION

- BS – Southern Illinois University

AFFILIATIONS/CERTIFICATIONS

- QEI Certified Elevator Inspector (NAESA)
- International Association of Elevator Consultants (IAEC)
- Licensed Elevator Inspector (No. 73) Missouri
- Licensed Elevator Inspector (IL03379) Illinois



Responsible for Vertical Transportation Services:

- New Construction Design
- Modernization Design
- Maintenance Evaluations
- Due Diligence Inspections

DIRECT: 314-668-7351

EMAIL: dhardin@atis.com



 An ATIS Elevator Advisor on your side

CONTACT: +1 855 755 ATIS

ATIS.com

EXHIBIT B PROVIDER RESPONSE

6

No claim history to report



EXHIBIT B PROVIDER RESPONSE

Consulting Project References - ATIS Elevator Consulting

1. **Project Name:** Missouri State University 2021 Contract Conformance and Equipment Assessment.

Location: Missouri State University, 901 S National Ave. Springfield, MO

Assigned Consultant: Dave Hardin and Zack Perry

Description of Services Performed:

- Performed Maintenance Assessments (consulting services) on 54 of the 107 elevator/lift units on campus (Our firm review every unit on campus over a two-year period)
- Reviewed the quality of the current maintenance contractor to verify conformance with the service contract requirements and note deficiencies.
- Reviewed the elevator and lift units for compliance with Elevator and Building Code requirements.
- Provide a listing of recommended elevators to be renovated over the next 0-5 years, 5-10 years, and 10+ years.

References (for each project listed above, identify the following):

The firm's name and representative who served as the day-to-day liaison during the project, including telephone number and/or email address; Missouri State University- Mike Polm- mpolm@missouristate.edu (417) 836-8767

Length of business relationship with the firm: 15+ years

2. **Project Name:** University of Missouri- Columbia Memorial Stadium South Expansion

Location: University of Missouri- Memorial Stadium, 600 E. Stadium Blvd., Columbia, MO

Assigned Consultant: Dave Hardin and Zack Perry

Description of Services Performed:

- Provided Consulting Services for the construction of three (3) electric traction passenger elevators and one (1) direct plunger hydraulic elevator.
- Generated construction documents, including the Division 14 (Elevator) specifications and a letter identifying associated building work for other divisions (hoistway envelopes, structural loads, electrical requirements, heat output, ventilation, interface with other building systems, etc.)
- Provided Construction Management services for the elevator work, including reviewing shop drawings, attending progress meetings, and responding to RFI's.
- Performed final observation and inspection of safety tests to satisfy code and specification requirements.

References (for each project listed above, identify the following):

The firm's name and representative who served as the day-to-day liaison during the project, including telephone number and/or email address; University of Missouri- Columbia: Planning, Design, and Construction- Pam Eugster- eugsterpj@missouri.edu (573)882-1444

Length of business relationship with the firm: 25+ years

EXHIBIT B PROVIDER RESPONSE

3. Project Name: University of Illinois- Transportation Building

Location: University of Illinois- Transportation Building, 104 S. Mathews, Urbana, IL 61801

Assigned Consultant: Dave Hardin and Zack Perry

Description of Services Performed:

- Provided Consulting Services for the modernization of one (1) electric geared traction passenger elevator.
 - Provided a Design Development physical inspection to determine which elevator components could be retained or replaced in a renovation. Provided a report with upgrade and renovation options, associated work, and cost estimates for each option.
 - Generated construction documents, including the Division 14 (Elevator) specifications and a letter identifying associated building work for other divisions (hoistway envelopes, structural loads, electrical requirements, heat output, ventilation, interface with other building systems, etc.)
 - Assisted the University with bidding to the elevator contractors and negotiating contract terms.
 - Provided Construction Management services for the elevator work, including reviewing shop drawings, attending progress meetings, and responding to RFI's.
 - Performed final observation and inspection of safety tests to satisfy code and specification requirements.
- **References (for each project listed above, identify the following):**
The firm's name and representative who served as the day-to-day liaison during the project, including telephone number and/or email address; Gorski Reifsteck Architects- Charles Reifsteck- (217) 351-4100, creifsteck@rr-arch.com
Length of business relationship with the firm: 5 years

4. Project name, location, and description of services performed:

Project Name: Washington University- McKelvey Hall

Location: Washington University- McKelvey Hall, 1 Brookings Drive, St. Louis, MO

Assigned Consultant: Dave Hardin and Zack Perry

Description of Services Performed:

- Provided Consulting Services for the construction of two (2) direct plunger hydraulic passenger elevators in an existing building.
- Generated construction documents, including the Division 14 (Elevator) specifications and a letter identifying associated building work for other divisions (hoistway envelopes, structural loads, electrical requirements, heat output, ventilation, interface with other building systems, etc.)
- Provided Construction Management services for the elevator work, including reviewing shop drawings, attending progress meetings, and responding to RFI's.
- Performed final observation and inspection of safety tests to satisfy code and specification requirements.

References (for each project listed above, identify the following):

The firm's name and representative who served as the day-to-day liaison during the project, including telephone number and/or email address; McCarthy Building Companies, Inc- Tom Parker- (314) 968-3300, tparker@mccarthy.com
Length of business relationship with the firm: 10+ years

EXHIBIT B PROVIDER RESPONSE

5. Project name, location, and description of services performed:

Project Name: NEXVEST Realty Advisors

Location: City Place Tower, 2711 North Haskell, Dallas, TX, and 5400 Legacy Drive, Plano, TX

Assigned Consultant: Sanjay Kamani and Thomas Bruce

Description of Services Performed:

- Service management, renovation of 74 elevators
- Annual review of 74 elevators and escalators.
- Review of service contracts. Modernization of 74 elevators.
- Modernization of all 74 elevators over multiple years, developed modernization spec, bid modernization work, project management install work and final acceptance of equipment to contract specs.

References (for each project listed above, identify the following):

The firm's name and representative who served as the day-to-day liaison during the project, including telephone number and/or email address; NEXVEST Realty Advisors,

Joan Shuffield, Senior Property Manager, jshuffield@nexvestra.com , 214-828-8894

Length of business relationship with the firm: 8+ years



5.7. Describe how you track Owner input and review comments to confirm that they have been addressed. * Provide examples of reports/logs used for tracking response to and closure on Owner comments.

Owner input and review comments from the Owner are tracked via email communications and/or written confirmation (for telephone or verbal queries) from ATIS so that any input or reviews can be acknowledged and tracked. As the project progresses, Owner input and review comments may also be logged during scheduled project meetings between the Owner, Elevator Contractor, and ATIS, as part of meeting notes, and action items to be addressed for all parties to the meeting. It is necessary to ensure that verbal communications from any party involved in the project have written acknowledgements and verification of completion of any action items.

Below is an example used from previous projects.

Description of Query/Comment	Initiating Party	Reference Location	Date Initiated	Date Acknowledged	Acknowledgement Method	Response Source	Response Method	Date Responded To	Date Completed
Alternates from Major Manufacturers vs. specified 3rd Party Manufacturers	Owner	Specifications, Products, Section 3.1, Page 24	May 1st, 2024	May 1st, 2024	email	ATIS	e-mail	May 1st, 2024	May 3rd, 2024
5 Year existence of bidder within local market. Registered within the State or project city	Bidder	Specifications, Qualifications Section 1, Page 3	May 15th, 2024	May 15th, 2024	Pre-Bid Meeting	Company X	Addendum 1	May 16th, 2024	May 16th, 2024
References. 5 Reference - Do references have to be in project city?	Bidder	Specifications, Qualifications Section 1, Page 3	May 15th, 2024	May 15th, 2024	Pre-Bid Meeting	Company Y	Addendum 1	May 16th, 2024	May 16th, 2024

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EXHIBIT B PROVIDER RESPONSE



6.3. Understanding schedule limitations provide an analysis of the Owner's project planning schedule and describe how you plan to develop and communicate design, scope, and budget options in a form that will quickly facilitate the Owner's decision making.*

Below is a sample timeline for a three (3) car modernization. This should provide you with an understanding of how we would approach your project.

5/23/25	Notice of Intent to Award
7/08/25	Board Consideration of Award Date – Contract Signed
8/1/2025	Contract Start Date
8/4/25 to 8/15/25	Site Survey
8/15/25 to 8/29/25	Survey Report and findings
8/29/25 to 9/12/25	Meet with County Representatives to review report
9/12/25 to 9/26/25	Specification Creation
9/26/25 to 10/3/25	Specification Review by County
10/3/25 to 10/29/25	Request for Proposal and Modernization Bidding Process
10/29/25 to 11/12/25	Bid Review and Consultant Recommendation for Award
11/12/25 to 12/3/25	Modernization Contractor Award. TBD. Tentative Timeline.
12/3/25 to 12/14/25	Contractor Surveys, Submittal Review
12/14/25 to 12/28/25	Submittal Review Approvals
12/28/25 to 4/17/26	Equipment Engineering, Manufacturing, and Delivery
4/17/26 to 7/17/26	Modernization of Elevator 1 and Inspection
7/17/26 to 11/17/26	Modernization of Elevator 2 and Inspection
11/17/26 to 3/17/27	Modernization of Elevator 3 and Inspection
3/22/26 to 4/2/27	Final Punchout and Review
4/5/27 to 4/30/27	Project Closeout

EXHIBIT B PROVIDER RESPONSE



EXHIBIT B PROVIDER RESPONSE

Form **W-9**
(Rev. March 2024)
Department of the Treasury
Internal Revenue Service

**Request for Taxpayer
Identification Number and Certification**

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

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

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

1 Name of entity/individual. An entry is required. (For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)

ATIS Elevator Inspections, LLC

2 Business name/disregarded entity name, if different from above.

3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only **one** of the following seven boxes.

☐ Individual/sole proprietor ☐ C corporation ☐ S corporation ☐ Partnership ☐ Trust/estate

☒ **LLC.** Enter the tax classification (C = C corporation, S = S corporation, P = Partnership) **P**

Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner.

☐ Other (see instructions)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) **NA**

Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) **NA**

(Applies to accounts maintained outside the United States.)

3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See instructions ☐

5 Address (number, street, and apt. or suite no.). See instructions.

600 Emerson Road, Suite 225

6 City, state, and ZIP code

Saint Louis, MO 63141

7 List account number(s) here (optional)

Requester's name and address (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. See also *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number

- -

or

Employer identification number

4 6 - 1 4 7 1 8 8 8

Part II Certification

Under penalties of perjury, I certify that:

- 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
- 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
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and, generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here

Signature of U.S. person

[Signature]

Date

4/2/2025

General Instructions

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

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

What's New

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

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

Purpose of Form

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

EXHIBIT B PROVIDER RESPONSE

Form W-9 (Rev. 3-2024)

Page 2

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-INT (interest earned or paid).
- 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-NEC (nonemployee compensation).
- 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), and 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.

Caution: If you don't return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding*, later.

By signing the filled-out form, you:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued);
2. Certify that you are not subject to backup withholding; or
3. Claim exemption from backup withholding if you are a U.S. exempt payee; and
4. Certify to your non-foreign status for purposes of withholding under chapter 3 or 4 of the Code (if applicable); and
5. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting is correct. See *What Is FATCA Reporting*, later, for further information.

Note: If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien;
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States;
- An estate (other than a foreign estate); or
- A domestic trust (as defined in Regulations section 301.7701-7).

Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding. Payments made to foreign persons, including certain distributions, allocations of income, or transfers of sales proceeds, may be subject to withholding under chapter 3 or chapter 4 of the Code (sections 1441-1474). Under those rules, if a Form W-9 or other certification of non-foreign status has not been received, a withholding agent, transferee, or partnership (payor) generally applies presumption rules that may require the payor to withhold applicable tax from the recipient, owner, transferor, or partner (payee). See Pub. 515, *Withholding of Tax on Nonresident Aliens and Foreign Entities*.

The following persons must provide Form W-9 to the payor for purposes of establishing its non-foreign status.

- In the case of a disregarded entity with a U.S. owner, the U.S. owner of the disregarded entity and not the disregarded entity.
- In the case of a grantor trust with a U.S. grantor or other U.S. owner, generally, the U.S. grantor or other U.S. owner of the grantor trust and not the grantor trust.
- In the case of a U.S. trust (other than a grantor trust), the U.S. trust and not the beneficiaries of the trust.

See Pub. 515 for more information on providing a Form W-9 or a certification of non-foreign status to avoid withholding.

Foreign person. If you are a foreign person or the U.S. branch of a foreign bank that has elected to be treated as a U.S. person (under Regulations section 1.1441-1(b)(2)(iv) or other applicable section for chapter 3 or 4 purposes), do not use Form W-9. Instead, use the appropriate Form W-8 or Form 8233 (see Pub. 515). If you are a qualified foreign pension fund under Regulations section 1.897(l)-1(d), or a partnership that is wholly owned by qualified foreign pension funds, that is treated as a non-foreign person for purposes of section 1445 withholding, do not use Form W-9. Instead, use Form W-8EXP (or other certification of non-foreign status).

Nonresident alien who becomes a resident alien. Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a saving clause. Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items.

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

Example. Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if their stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first Protocol) and is relying on this exception to claim an exemption from tax on their scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity, give the requester the appropriate completed Form W-8 or Form 8233.

Backup Withholding

What is backup withholding? Persons making certain payments to you must under certain conditions withhold and pay to the IRS 24% of such payments. This is called "backup withholding." Payments that may be subject to backup withholding include, but are not limited to, interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, payments made in settlement of payment card and third-party network transactions, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

Payments you receive will be subject to backup withholding if:

1. You do not furnish your TIN to the requester;
2. You do not certify your TIN when required (see the instructions for Part II for details);
3. The IRS tells the requester that you furnished an incorrect TIN;
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only); or
5. You do not certify to the requester that you are not subject to backup withholding, as described in item 4 under "By signing the filled-out form" above (for reportable interest and dividend accounts opened after 1983 only).

EXHIBIT B PROVIDER RESPONSE

Form W-9 (Rev. 3-2024)

Page 3

Certain payees and payments are exempt from backup withholding. See *Exempt payee code*, later, and the separate Instructions for the Requester of Form W-9 for more information.

See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier.

What Is FATCA Reporting?

The Foreign Account Tax Compliance Act (FATCA) requires a participating foreign financial institution to report all U.S. account holders that are specified U.S. persons. Certain payees are exempt from FATCA reporting. See *Exemption from FATCA reporting code*, later, and the Instructions for the Requester of Form W-9 for more information.

Updating Your Information

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you are no longer tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

Penalties

Failure to furnish TIN. If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

Civil penalty for false information with respect to withholding. If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

Criminal penalty for falsifying information. Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

Misuse of TINs. If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

Specific Instructions

Line 1

You must enter one of the following on this line; **do not** leave this line blank. The name should match the name on your tax return.

If this Form W-9 is for a joint account (other than an account maintained by a foreign financial institution (FFI)), list first, and then circle, the name of the person or entity whose number you entered in Part I of Form W-9. If you are providing Form W-9 to an FFI to document a joint account, each holder of the account that is a U.S. person must provide a Form W-9.

• **Individual.** Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Note for ITIN applicant: Enter your individual name as it was entered on your Form W-7 application, line 1a. This should also be the same as the name you entered on the Form 1040 you filed with your application.

• **Sole proprietor.** Enter your individual name as shown on your Form 1040 on line 1. Enter your business, trade, or "doing business as" (DBA) name on line 2.

• **Partnership, C corporation, S corporation, or LLC, other than a disregarded entity.** Enter the entity's name as shown on the entity's tax return on line 1 and any business, trade, or DBA name on line 2.

• **Other entities.** Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity. Enter any business, trade, or DBA name on line 2.

• **Disregarded entity.** In general, a business entity that has a single owner, including an LLC, and is not a corporation, is disregarded as an entity separate from its owner (a disregarded entity). See Regulations section 301.7701-2(c)(2). A disregarded entity should check the appropriate box for the tax classification of its owner. Enter the owner's name on line 1. The name of the owner entered on line 1 should never be a disregarded entity. The name on line 1 should be the name shown on the income tax return on which the income should be reported. For

example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a single owner that is a U.S. person, the U.S. owner's name is required to be provided on line 1. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on line 2. If the owner of the disregarded entity is a foreign person, the owner must complete an appropriate Form W-8 instead of a Form W-9. This is the case even if the foreign person has a U.S. TIN.

Line 2

If you have a business name, trade name, DBA name, or disregarded entity name, enter it on line 2.

Line 3a

Check the appropriate box on line 3a for the U.S. federal tax classification of the person whose name is entered on line 1. Check only one box on line 3a.

IF the entity/individual on line 1 is a(n) . . .	THEN check the box for . . .
• Corporation	Corporation.
• Individual or	Individual/sole proprietor.
• Sole proprietorship	
• LLC classified as a partnership for U.S. federal tax purposes or	Limited liability company and enter the appropriate tax classification:
• LLC that has filed Form 8832 or 2553 electing to be taxed as a corporation	P = Partnership, C = C corporation, or S = S corporation.
• Partnership	Partnership.
• Trust/estate	Trust/estate.

Line 3b

Check this box if you are a partnership (including an LLC classified as a partnership for U.S. federal tax purposes), trust, or estate that has any foreign partners, owners, or beneficiaries, and you are providing this form to a partnership, trust, or estate, in which you have an ownership interest. You must check the box on line 3b if you receive a Form W-8 (or documentary evidence) from any partner, owner, or beneficiary establishing foreign status or if you receive a Form W-9 from any partner, owner, or beneficiary that has checked the box on line 3b.

Note: A partnership that provides a Form W-9 and checks box 3b may be required to complete Schedules K-2 and K-3 (Form 1065). For more information, see the Partnership Instructions for Schedules K-2 and K-3 (Form 1065).

If you are required to complete line 3b but fail to do so, you may not receive the information necessary to file a correct information return with the IRS or furnish a correct payee statement to your partners or beneficiaries. See, for example, sections 6698, 6722, and 6724 for penalties that may apply.

Line 4 Exemptions

If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you.

Exempt payee code.

- Generally, individuals (including sole proprietors) are not exempt from backup withholding.
- Except as provided below, corporations are exempt from backup withholding for certain payments, including interest and dividends.
- Corporations are not exempt from backup withholding for payments made in settlement of payment card or third-party network transactions.
- Corporations are not exempt from backup withholding with respect to attorneys' fees or gross proceeds paid to attorneys, and corporations that provide medical or health care services are not exempt with respect to payments reportable on Form 1099-MISC.

The following codes identify payees that are exempt from backup withholding. Enter the appropriate code in the space on line 4.

1—An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2). For

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- 2—The United States or any of its agencies or instrumentalities.
 3—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.
 4—A foreign government or any of its political subdivisions, agencies, or instrumentalities.
 5—A corporation.
 6—A dealer in securities or commodities required to register in the United States, the District of Columbia, or a U.S. commonwealth or territory.
 7—A futures commission merchant registered with the Commodity Futures Trading Commission.
 8—A real estate investment trust.
 9—An entity registered at all times during the tax year under the Investment Company Act of 1940.
 10—A common trust fund operated by a bank under section 584(a).
 11—A financial institution as defined under section 581.
 12—A middleman known in the investment community as a nominee or custodian.
 13—A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 13.

IF the payment is for . . .	THEN the payment is exempt for . . .
• Interest and dividend payments	All exempt payees except for 7.
• Broker transactions	Exempt payees 1 through 4 and 6 through 11 and all C corporations. S corporations must not enter an exempt payee code because they are exempt only for sales of noncovered securities acquired prior to 2012.
• Barter exchange transactions and patronage dividends	Exempt payees 1 through 4.
• Payments over \$600 required to be reported and direct sales over \$5,000 ¹	Generally, exempt payees 1 through 5. ²
• Payments made in settlement of payment card or third-party network transactions	Exempt payees 1 through 4.

¹ See Form 1099-MISC, Miscellaneous Information, and its instructions.

² However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney reportable under section 6045(f), and payments for services paid by a federal executive agency.

Exemption from FATCA reporting code. The following codes identify payees that are exempt from reporting under FATCA. These codes apply to persons submitting this form for accounts maintained outside of the United States by certain foreign financial institutions. Therefore, if you are only submitting this form for an account you hold in the United States, you may leave this field blank. Consult with the person requesting this form if you are uncertain if the financial institution is subject to these requirements. A requester may indicate that a code is not required by providing you with a Form W-9 with "Not Applicable" (or any similar indication) entered on the line for a FATCA exemption code.

A—An organization exempt from tax under section 501(a) or any individual retirement plan as defined in section 7701(a)(37).

B—The United States or any of its agencies or instrumentalities.

C—A state, the District of Columbia, a U.S. commonwealth or territory, or any of their political subdivisions or instrumentalities.

D—A corporation the stock of which is regularly traded on one or more established securities markets, as described in Regulations section 1.1472-1(c)(1)(i).

E—A corporation that is a member of the same expanded affiliated group as a corporation described in Regulations section 1.1472-1(c)(1)(i).

F—A dealer in securities, commodities, or derivative financial instruments (including notional principal contracts, futures, forwards, and options) that is registered as such under the laws of the United States or any state.

G—A real estate investment trust.

H—A regulated investment company as defined in section 851 or an entity registered at all times during the tax year under the Investment Company Act of 1940.

I—A common trust fund as defined in section 584(a).

J—A bank as defined in section 581.

K—A broker.

L—A trust exempt from tax under section 664 or described in section 4947(a)(1).

M—A tax-exempt trust under a section 403(b) plan or section 457(g) plan.

Note: You may wish to consult with the financial institution requesting this form to determine whether the FATCA code and/or exempt payee code should be completed.

Line 5

Enter your address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. If this address differs from the one the requester already has on file, enter "NEW" at the top. If a new address is provided, there is still a chance the old address will be used until the payor changes your address in their records.

Line 6

Enter your city, state, and ZIP code.

Part I. Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. If you are a resident alien and you do not have, and are not eligible to get, an SSN, your TIN is your IRS ITIN. Enter it in the entry space for the Social security number. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN.

If you are a single-member LLC that is disregarded as an entity separate from its owner, enter the owner's SSN (or EIN, if the owner has one). If the LLC is classified as a corporation or partnership, enter the entity's EIN.

Note: See *What Name and Number To Give the Requester*, later, for further clarification of name and TIN combinations.

How to get a TIN. If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local SSA office or get this form online at www.SSA.gov. You may also get this form by calling 800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at www.irs.gov/EIN. Go to www.irs.gov/Forms to view, download, or print Form W-7 and/or Form SS-4. Or, you can go to www.irs.gov/OrderForms to place an order and have Form W-7 and/or Form SS-4 mailed to you within 15 business days.

If you are asked to complete Form W-9 but do not have a TIN, apply for a TIN and enter "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, you will generally have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

Note: Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon. See also *Establishing U.S. status for purposes of chapter 3 and chapter 4 withholding*, earlier, for when you may instead be subject to withholding under chapter 3 or 4 of the Code.

Caution: A disregarded U.S. entity that has a foreign owner must use the appropriate Form W-8.

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Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, 4, or 5 below indicates otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on line 1 must sign. Exempt payees, see *Exempt payee code*, earlier.

Signature requirements. Complete the certification as indicated in items 1 through 5 below.

1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983. You must give your correct TIN, but you do not have to sign the certification.

2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983. You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

3. Real estate transactions. You must sign the certification. You may cross out item 2 of the certification.

4. Other payments. You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments made in settlement of payment card and third-party network transactions, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), ABLE accounts (under section 529A), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions. You must give your correct TIN, but you do not have to sign the certification.

What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account) other than an account maintained by an FFI	The actual owner of the account or, if combined funds, the first individual on the account ¹
3. Two or more U.S. persons (joint account maintained by an FFI)	Each holder of the account
4. Custodial account of a minor (Uniform Gift to Minors Act)	The minor ²
5. a. The usual revocable savings trust (grantor is also trustee)	The grantor-trustee ¹
b. So-called trust account that is not a legal or valid trust under state law	The actual owner ¹
6. Sole proprietorship or disregarded entity owned by an individual	The owner ³
7. Grantor trust filing under Optional Filing Method 1 (see Regulations section 1.671-4(b)(2)(i)(A))**	The grantor*

For this type of account:	Give name and EIN of:
8. Disregarded entity not owned by an individual	The owner
9. A valid trust, estate, or pension trust	Legal entity ⁴
10. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
11. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
12. Partnership or multi-member LLC	The partnership
13. A broker or registered nominee	The broker or nominee
14. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
15. Grantor trust filing Form 1041 or under the Optional Filing Method 2, requiring Form 1099 (see Regulations section 1.671-4(b)(2)(i)(B))**	The trust

¹ List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

² Circle the minor's name and furnish the minor's SSN.

³ You must show your individual name on line 1, and enter your business or DBA name, if any, on line 2. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

⁴ List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.)

*Note: The grantor must also provide a Form W-9 to the trustee of the trust.

**For more information on optional filing methods for grantor trusts, see the Instructions for Form 1041.

Note: If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

Secure Your Tax Records From Identity Theft

Identity theft occurs when someone uses your personal information, such as your name, SSN, or other identifying information, without your permission to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax return preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity, or a questionable credit report, contact the IRS Identity Theft Hotline at 800-908-4490 or submit Form 14039.

For more information, see Pub. 5027, Identity Theft Information for Taxpayers.

EXHIBIT B PROVIDER RESPONSE

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 23, 84th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code, by a vendor who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the vendor meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the vendor becomes aware of facts that require the statement to be filed. See Section 176.006(a-1), Local Government Code.

A vendor commits an offense if the vendor knowingly violates Section 176.006, Local Government Code. An offense under this section is a misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of vendor who has a business relationship with local governmental entity.

NA

2 ☐ Check this box if you are filing an update to a previously filed questionnaire. (The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date on which you became aware that the originally filed questionnaire was incomplete or inaccurate.)

3 Name of local government officer about whom the information is being disclosed.

Name of Officer

4 Describe each employment or other business relationship with the local government officer, or a family member of the officer, as described by Section 176.003(a)(2)(A). Also describe any family relationship with the local government officer. Complete subparts A and B for each employment or business relationship described. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer or a family member of the officer receiving or likely to receive taxable income, other than investment income, from the vendor?

☐ Yes

☐ No

B. Is the vendor receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer or a family member of the officer AND the taxable income is not received from the local governmental entity?

☐ Yes

☐ No

5 Describe each employment or business relationship that the vendor named in Section 1 maintains with a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership interest of one percent or more.

6 ☐ Check this box if the vendor has given the local government officer or a family member of the officer one or more gifts as described in Section 176.003(a)(2)(B), excluding gifts described in Section 176.003(a-1).

7

NA

Signature of vendor doing business with the governmental entity

Date

EXHIBIT B PROVIDER RESPONSE

CONFLICT OF INTEREST QUESTIONNAIRE

For vendor doing business with local governmental entity

A complete copy of Chapter 176 of the Local Government Code may be found at <http://www.statutes.legis.state.tx.us/Docs/LG/htm/LG.176.htm>. For easy reference, below are some of the sections cited on this form.

Local Government Code § 176.001(1-a): "Business relationship" means a connection between two or more parties based on commercial activity of one of the parties. The term does not include a connection based on:

- (A) a transaction that is subject to rate or fee regulation by a federal, state, or local governmental entity or an agency of a federal, state, or local governmental entity;
- (B) a transaction conducted at a price and subject to terms available to the public; or
- (C) a purchase or lease of goods or services from a person that is chartered by a state or federal agency and that is subject to regular examination by, and reporting to, that agency.

Local Government Code § 176.003(a)(2)(A) and (B):

- (a) A local government officer shall file a conflicts disclosure statement with respect to a vendor if:

- (2) the vendor:

(A) has an employment or other business relationship with the local government officer or a family member of the officer that results in the officer or family member receiving taxable income, other than investment income, that exceeds \$2,500 during the 12-month period preceding the date that the officer becomes aware that

- (i) a contract between the local governmental entity and vendor has been executed;
- or

- (ii) the local governmental entity is considering entering into a contract with the vendor;

(B) has given to the local government officer or a family member of the officer one or more gifts that have an aggregate value of more than \$100 in the 12-month period preceding the date the officer becomes aware that:

- (i) a contract between the local governmental entity and vendor has been executed; or
- (ii) the local governmental entity is considering entering into a contract with the vendor.

Local Government Code § 176.006(a) and (a-1)

- (a) A vendor shall file a completed conflict of interest questionnaire if the vendor has a business relationship with a local governmental entity and:

- (1) has an employment or other business relationship with a local government officer of that local governmental entity, or a family member of the officer, described by Section 176.003(a)(2)(A);
- (2) has given a local government officer of that local governmental entity, or a family member of the officer, one or more gifts with the aggregate value specified by Section 176.003(a)(2)(B), excluding any gift described by Section 176.003(a-1); or
- (3) has a family relationship with a local government officer of that local governmental entity.

- (a-1) The completed conflict of interest questionnaire must be filed with the appropriate records administrator not later than the seventh business day after the later of:

- (1) the date that the vendor:

- (A) begins discussions or negotiations to enter into a contract with the local governmental entity; or
- (B) submits to the local governmental entity an application, response to a request for proposals or bids, correspondence, or another writing related to a potential contract with the local governmental entity; or

- (2) the date the vendor becomes aware:

- (A) of an employment or other business relationship with a local government officer, or a family member of the officer, described by Subsection (a);
- (B) that the vendor has given one or more gifts described by Subsection (a); or
- (C) of a family relationship with a local government officer.

EXHIBIT C PRICING PROPOSAL



REQUEST FOR QUALIFICATION 2025-137
ELEVATOR AND ESCALATOR VERTICAL TRANSPORTATION CONSULTING

Pricing

ATIS will provide the following Scope of Services at the billable rate of \$275/hr.

Scope of Services: The consulting services should include but not be limited to:

- Performing thorough inspections of existing elevators and escalators to assess condition and compliance.
- Identifying potential safety hazards and recommending corrective actions.
- Evaluating the performance and efficiency of current elevator systems.
- Assisting in the formulation of maintenance plans based on inspection results.
- Providing recommendations for upgrades or replacements where necessary.
- Offering training and guidance for on-site personnel regarding elevator safety procedures.
- Documenting all findings and recommendations in a comprehensive report that includes but is not limited to: Cost per Elevator/Escalator modernization packages, Budget Cost for modernization of each elevator/escalator
- Provide drawings
- Assist with Bid Documents and Scope of Work modernization
- Timeliness: Services must be initiated within 30 days of contract award, with written deliverables provided as outlined in the delivery requirements.

For each project phase, the consultant will provide a written quote derived from the anticipated hours necessary for completion, multiplied by the hourly rate, which will be presented to Collin County for approval prior to performing said services.

Any additional consulting services requested by Collin County, not listed in the Scope of Services, will also be assessed at the same rate of \$275/hr.

The hourly rate will be prorated and assessed in fifteen (15) minute increments.

Please let me know if you have any questions or need any additional information.

Sincerely,

A handwritten signature in black ink, appearing to read 'Jay J. Sitzmann'.

Jay Sitzmann
Sales Executive
314-396-7894