SUMTER COUNTY BOARD OF COUNTY COMMISSIONERS
EXECUTIVE SUMMARY

SUBJECT: Award and Enter into Contract Negotiations with M.T. Causley, LLC for RFQ 005-0-2019/RS Sumter County Chief Building Inspector Services (Staff Recommends Approval).

REQUESTED ACTION: Staff Recommends Approval

Meeting Type: Regular Meeting DATE OF MEETING: 2/12/2019

CONTRACT: □ N/A Vendor/Entity: M.T. Causley, LLC
Effective Date: Termination Date: 
Managing Division / Dept: Purchasing

BUDGET IMPACT: TBD through contract negotiations
FUNDING SOURCE:
Type: Annual EXPENDITURE ACCOUNT: 

HISTORY/FACTS/ISSUES:
RFQ 005-0-2019/RS Sumter County Chief Building Inspector Services was broadcasted on 12/13/2018. Qualifications were due on 1/15/2019 at 10:00 a.m. and opened at 10:05 a.m. in Room 110 of The Villages Sumter County Service Center, 7375 Powell Road, Wildwood, FL 34785.

Three (3) qualification packages were received from the following firms:
1. M.T. Causley, LLC
2. Bureau Veritas
3. PDCS

There was a conflict of interest with the submittal by PDCS and their submittal was not considered for this RFQ.

The Selection Committee met on 1/17/2019 at 10:00 a.m. in Room 110 of The Villages Sumter County Service Center to score the remaining two RFQ submittals. Scoring is listed below:

M.T. Causley, LLC – 12.8
Bureau Veritas – 12.8

Based on the scoring results, the Selection Committee agreed that vendor presentations were necessary.

Vendor presentations were conducted on 1/22/2019 beginning at 9:00 a.m. in Room 208 of The Villages Sumter County Service Center. After vendor presentations by Bureau Veritas and M.T. Causley, LLC, the Selection Committee met to discuss and score the presentations. Scoring is listed below:

M.T. Causley, LLC - 14.15
Bureau Veritas – 13.20

Based on the scoring, the Selection Committee agreed to recommend to the Sumter County Board of County Commissioners to enter into contract negotiations with M.T. Causley, LLC. If negotiations are unsuccessful with M.T. Causley, LLC, the Selection Committee recommends to enter into contract negotiations with Bureau Veritas.
SUMTER COUNTY BOARD OF COUNTY COMMISSIONERS
EXECUTIVE SUMMARY

The following items are attached: legal ad, qualifications opening meeting minutes from 1/15/2019, Selection Committee meeting minutes from 1/17/2019, RFQ 005-0-2019/RS qualifications document, and RFQ submittal from M.T. Causley, LLC.

| Prepared by: | Becky Segrest | Grammarly Check |
REQUEST FOR QUALIFICATIONS (RFQ)

Notice is hereby given that the Sumter County Board of County Commissioners (BOCC) will receive qualification packages for the following: "RFQ 005-2019/RS Sumter County Chief Building Inspector Services".

Information is available upon request by calling (352) 689-4400, by coming to the Purchasing Division located at 316 E. Seminole Avenue, Bushnell, Florida 33513, or by contacting Demand Star at 1-800-711-1712 or www.DemandStar.com.

All inquiries and questions regarding this request for qualifications must be made only to the contact identified below and shall be made in writing by fax, e-mail, or mail:

Mrs. Becky Segrest,
Assistant Purchasing Agent/ Logistics Manager
Mailing Address:
7375 Powell Road, Suite 200
Wildwood, FL 34785
E-mail: Becky.Segrest@sumter-countyfl.gov
Fax: (352) 689-4401

The deadline for submission of questions relating to the RFQ shall be December 27, 2018 by 5:00 p.m. A copy of the RFQ must be obtained in order to view the items being requested by BOCC.

All RFQ packages are due by 10:00 a.m. on January 15, 2019 to the address listed above. Late submittals will not be opened. All RFQ submittals must be clearly marked as: "RFQ 005-2019/RS Sumter County Chief Building Inspector Services".

Upon submission, all RFQ packages will become the property of the BOCC, who has the right to use any or all ideas presented in any packages submitted in response to this RFQ, whether or not the RFQ is accepted. Qualification packages will be opened at 10:05 a.m. on January 15, 2019 in Room 110 of The Villages Sumter County Service Center, Wildwood, FL 34785.

The Selection Committee shall meet on January 17, 2019 at 10:00 a.m. in Room 208 of The Villages Sumter County Service Center to review and discuss the qualification packages.

Vendor presentations, if deemed necessary, will be held on January 22, 2019 at 9:00 a.m. in Room 208 of The Villages Sumter County Service Center.

The Selection Committee’s recommendation will be presented to the BOCC on February 12, 2019.

SUMTER COUNTY BOARD OF COUNTY COMMISSIONERS
SUMTER COUNTY, FLORIDA
#853792 December 13, 2018
RFQ 005-0-2019/RS Sumter County Chief Building Inspector Services – RFQ Opening Meeting Minutes

The meeting was held on 1/15/2019 at 10:05 a.m. in Room 110 located at The Villages Sumter County Service Center, 7375 Powell Road, Wildwood, FL 34785.

Becky Segrest, Assistant Purchasing Agent/Logistics Manager, Emily Morrison, Purchasing Technician, and Jordan Bailey, Purchasing Technician were present on behalf of the Purchasing Division.

Kitty Fields, Employee Services Manager, and Joseph Duennes, Building Official, were present on behalf of the Selection Committee.

Becky Segrest opened the meeting and read aloud the remaining RFQ dates as follows:
- Selection Committee meeting will be held on 1/17/2019 at 10:00 a.m. in Room 110.
- Vendor Presentations, if deemed necessary, will be held on 1/21/2019 at 9:00 a.m. in Room 208.
- Recommendations to award and enter into contract will go to the Sumter County Board of County Commissioners on 2/12/2019.

Becky stated that all items on the Qualifications Document Checklist will be verified. If any items are omitted or found to be non-compliant then the Purchasing Agent will be notified and will determine if the RFQ is responsive or non-responsive.

Three (3) qualification package was received on time and opened. The following RFQ requirements were verified as follows:

<table>
<thead>
<tr>
<th>RFQ Requirements</th>
<th>M.T. Causley, LLC</th>
<th>Bureau Veritas</th>
<th>PDCS</th>
</tr>
</thead>
<tbody>
<tr>
<td>One original, three copies, 1 electronic pdf copy</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Qualification Cover Page</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Qualification Document Checklist</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Proposer Certification/Addenda Acknowledgement Form</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Statement of General Terms and Conditions</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>A sworn, notarized Statement of Firms Experience and Personnel</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
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<tr>
<td>Drug Free Workplace Certificate</td>
<td>Included</td>
<td>Included</td>
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</tr>
<tr>
<td>Hold Harmless Agreement</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>E-Verify Certification Form and electronic signature page from MOU</td>
<td>Included</td>
<td>Missing</td>
<td>Included</td>
</tr>
<tr>
<td>Anti-Collusion Statement</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Statement of Public Entity of Crimes</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Conflict of Interest Disclosure Form</td>
<td>Included</td>
<td>Included</td>
<td>Included</td>
</tr>
<tr>
<td>Certificate of Insurability</td>
<td>Included</td>
<td>Included</td>
<td>Missing</td>
</tr>
</tbody>
</table>

The meeting adjourned at 10:28 a.m.
# SIGN-IN SHEET

**DATE:** 1/15/19  
**TIME:** 10:05

**BID/RFP/RFQ NAME:** RFP 005-0-2019/ES

- [ ] Pre-Bid/Proposal/Qualifications Meeting  
- [X] Bid/RFP/RFQ Opening  
- [ ] Selection Committee Meeting  
- [ ] Vendor Presentations / Selection Committee Meeting

Please list all the companies you are representing beside your name.

<table>
<thead>
<tr>
<th>NAME</th>
<th>COMPANY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Emily Morrison</td>
<td>BCCC - Purchasing</td>
</tr>
<tr>
<td>Jordan Bailey</td>
<td>BCCC - Purchasing</td>
</tr>
<tr>
<td>Becky Segrest</td>
<td>Becky Segrest</td>
</tr>
<tr>
<td>Richelle Field</td>
<td>Employee Services</td>
</tr>
<tr>
<td>Joseph E. Quinone</td>
<td>Building Services</td>
</tr>
</tbody>
</table>
QUALIFICATION DOCUMENTS CHECKLIST OF ITEMS REQUIRED TO BE SUBMITTED

The following documents and forms in the following arrangement must accompany each RFQ or alternate RFQ submitted:

✔ One (1) original RFQ, clearly labeled "Original"; three (3) printed copies of the RFQ in its entirety; and one (1) electronic single PDF version not password protected of the original submitted RFQ in its entirety.

✔ RFQ Cover Page. This is to be used as the first page of the RFQ. This form must be fully completed and signed by an authorized officer of the vendor.

✔ Qualification Document Checklist of Items Required to be submitted (this sheet).

 refute A separate sheet or sheets, clearly identified and numbered, of Exceptions or Deviations from the minimum specifications, must be attached to the RFQ Form (if applicable).

✔ Proposer Certification / Addenda Acknowledgement Form.

✔ Statement of General Terms and Conditions.

✔ A sworn, notarized Statement of Contractor's Experience and Personnel.

✔ A sworn, notarized Drug Free Work Place Certificate must accompany each Qualification package or RFQ.

✔ Hold Harmless Agreement

✔ E-Verify Certification Form and the electronic signature page of the Memorandum of Understanding from the Department of Homeland Security.

✔ Anti-Collusion Statement

✔ Statement of Public Entity Crimes

✔ Conflict of Interest Disclosure Form

✖ A Certificate of Insurability, acceptable to the County, shall accompany each RFQ or alternate RFQ, in the amounts as prescribed by State and Sumter County BOCC
  • All insurance policies shall be written on companies authorized to do business in the State of Florida and satisfactory to the Sumter County BOCC. Prior to commencing services pursuant to the award of this RFQ, the Contractor shall furnish to the Sumter County BOCC certificates of insurance showing the required coverage has been procured and paid for in advance. Within thirty (30) days prior to expiration, the Contractor shall provide the Sumter County BOCC with proof that required coverage has been extended.
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- Anti-Collusion Statement

- Statement of Public Entity Crimes

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Selection Committee Meeting Minutes for RFQ 005-0-2019 /RS Sumter County Chief Building Inspector Services.

The meeting was held on 1/17/2019 at 10:00 a.m. in Room 110 located at The Villages Sumter County Service Center, 7375 Powell Road, Wildwood, FL 34785.

- Kitty Fields, Employee Services Manager, Joseph Duennes, Building Official, and Karl Holley, Development Services Director, were present on behalf of the Selection Committee.
- Becky Segrest, Assistant County Purchasing Agent/Logistics Manager, Emily Morrison, Purchasing Technician, and Jordan Bailey, Purchasing Technician, were present on behalf of the Purchasing Division.

Becky announced that there was a conflict of interest with the submittal by PDCS and they would not be considered for this qualification. She also announced that if deemed necessary, vendor presentations will be held on 1/21/2019 starting at 9:00 a.m. in Room 208. The final recommendation of the Selection Committee will go to the Sumter County Board of County Commissioners (BOCC) on 2/12/2019.

The Selection Committee submitted their scoring of the RFQ submittals as follows:

<table>
<thead>
<tr>
<th>Committee Members</th>
<th>Bureau Veritas</th>
<th>M.T. Causley, LLC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kitty Fields</td>
<td>3.8</td>
<td>3.9</td>
</tr>
<tr>
<td>Joseph Duennes</td>
<td>4.8</td>
<td>4.7</td>
</tr>
<tr>
<td>Karl Holley</td>
<td>4.2</td>
<td>4.2</td>
</tr>
<tr>
<td>Totals:</td>
<td><strong>12.8</strong></td>
<td><strong>12.8</strong></td>
</tr>
</tbody>
</table>

The Selection Committee agreed to go into vendor presentations due to the closeness of the scores given.

The meeting adjourned at 10:32 a.m.
SIGN-IN SHEET

DATE: 1/17/19
TIME: 10:00 am Room 110

BID/RFP/RFQ NAME: RFP 005-0-2019/RE

- Pre-Bid/Proposal/Qualifications Meeting
- Bid/RFP/RFQ Opening
- Selection Committee Meeting
- Vendor Presentations / Selection Committee Meeting

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<td>Joseph E. Dunnes</td>
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# RFQ EVALUATION

This Request for Statements of Qualifications includes following all the procedures in this document and sending the sealed Statements of Qualifications information to the BOCC by the due date and time. Once the Statements of Qualifications are received, the Selection Committee members will independently review each submittal and score each Statement of Qualifications based on the evaluation criteria. All Statements of Qualifications received in accordance with this Request for Statements of Qualifications will be evaluated using the following criteria.

## Scoring for all RFQ's

<table>
<thead>
<tr>
<th>Score</th>
<th>Weight</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>0.20</td>
<td>1.0</td>
</tr>
<tr>
<td>4</td>
<td>0.20</td>
<td>0.8</td>
</tr>
<tr>
<td>5</td>
<td>0.20</td>
<td>1.0</td>
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<td>5</td>
<td>0.20</td>
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<tr>
<td>5</td>
<td>0.10</td>
<td>0.5</td>
</tr>
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**SCORE:**

- 0 = Non-Responsive
- 1 = Poor
- 2 = Fair
- 3 = Average (Included only minimum of what was asked for on subject criteria)
- 4 = Good
- 5 = Excellent

Total: 4.8
PART 2
EVALUATION AND AWARD

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<tbody>
<tr>
<td>1) Capability of the firm or firm(s) to perform all or most aspects of the services required.</td>
<td>5</td>
<td>.20</td>
<td>1.0</td>
<td></td>
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<tr>
<td>2) Qualifications and experience of key personnel and ability to provide qualified building support services.</td>
<td>4</td>
<td>.20</td>
<td>.8</td>
<td></td>
</tr>
<tr>
<td>3) Relevant experience in comparable projects/services and experience with similar size and type jurisdictions in similar environments.</td>
<td>5</td>
<td>.20</td>
<td>1.0</td>
<td></td>
</tr>
<tr>
<td>4) Familiarity with and an understanding of special problems, needs and considerations associated with performance of these building support services.</td>
<td>5</td>
<td>.20</td>
<td>1.0</td>
<td></td>
</tr>
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<td>5) Demonstrated ability to meet schedules and complete schedules without major cost escalations or disputes and to support project closeout requirements and documentation.</td>
<td>5</td>
<td>.10</td>
<td>.5</td>
<td></td>
</tr>
<tr>
<td>6) RFQ submittal quality and completeness/references.</td>
<td>4</td>
<td>.10</td>
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Total 4.7

Minor grammatical and typo errors
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<td>D4</td>
<td>.20</td>
<td>8</td>
</tr>
<tr>
<td>4) Familiarity with and an understanding of special problems, needs and considerations associated with performance of these building support services.</td>
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<tbody>
<tr>
<td>4</td>
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<td>.80</td>
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1) Capability of the firm or firm(s) to perform all or most aspects of the services required.

2) Qualifications and experience of key personnel and ability to provide qualified building support services.

3) Relevant experience in comparable projects/services and experience with similar size and type jurisdictions in similar environments.

4) Familiarity with and an understanding of special problems, needs and considerations associated with performance of these building support services.

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Page 12 of 32
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|  | 4 | 0.20 | 0.80 |

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|  | 4 | 0.20 | 0.80 |

| 3) Relevant experience in comparable projects/services and experience with similar size and type jurisdictions in similar environments. | Score | X Weight | Rating |
|  | 4 | 0.20 | 0.80 |

| 4) Familiarity with and an understanding of special problems, needs and considerations associated with performance of these building support services. | Score | X Weight | Rating |
|  | 3 | 0.20 | 0.60 |

| 5) Demonstrated ability to meet schedules and complete schedules without major cost escalations or disputes and to support project closeout requirements and documentation. | Score | X Weight | Rating |
|  | 4 | 0.10 | 0.40 |

| 6) RFQ submittal quality and completeness/references. | Score | X Weight | Rating |
|  | 5 | 0.10 | 0.50 |

SCORE:
0 = Non-Responsive
1 = Poor
2 = Fair
3 = Average (Included only minimum of what was asked for on subject criteria)
4 = Good
5 = Excellent

3.9

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The meetings were held on 1/22/19 starting at 9:00 a.m. in Room 208 located at The Villages Sumter County Service Center, 7375 Powell Road, Wildwood, FL 34785.

Karl Holley, Director of Development Services, Joe Duennes, Building Official, and Kitty Fields, Employee Services Manager, were present on behalf of the Selection Committee.

Becky Segrest, Assistant Purchasing Agent and Logistics Manager, Emilly Morrison, Purchasing Technician, and Jordan Bailey, Purchasing Technician were present on behalf of the Purchasing Division.

Becky announced that the recommendation of the Selection Committee will go to the Sumter County Board of County Commissioners (BOCC) for award and to enter into contract negotiations on 2/12/19.

Becky turned the meeting over to the vendor for the first presentation. All members felt that either firm would be capable of performing the duties. However, Kitty and Joe rated M.T. Causley, LLC higher because they had more resources on hand to pull from for the Sumter County duties. After the presentations were conducted, the Presentation Evaluation Forms were submitted and the scoring was as follows:

<table>
<thead>
<tr>
<th>Committee Member</th>
<th>Bureau Veritas</th>
<th>M.T. Causley, LLC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kitty Fields</td>
<td>4.45</td>
<td>5.00</td>
</tr>
<tr>
<td>Joseph Duennes</td>
<td>4.45</td>
<td>4.85</td>
</tr>
<tr>
<td>Karl Holley</td>
<td>4.30</td>
<td>4.30</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td><strong>13.20</strong></td>
<td><strong>14.15</strong></td>
</tr>
</tbody>
</table>

The Selection Committee agreed to recommend to the Sumter County Board of County Commissioners to enter into contract negotiations with M.T. Causley, LLC. If negotiations are unsuccessful with M.T. Causley, LLC, it is recommended by the Selection Committee to enter into contract negotiations with Bureau Veritas.

The presentations/Selection Committee meeting adjourned at 11:22 a.m.
Once the Selection Committee has independently scored all RFQ submissions using the scoring criteria listed above, scores will be tallied to determine the highest two or three ranking firms for vendor presentations.

If vendor presentations are necessary, presentations will be a total of 45 minutes. Each firm will have up to 30 minutes for their presentation and 15 minutes for questions and answers with the Selection Committee. Presentations will be timed and terminated if they extend beyond 30 minutes. Vendor presentations meetings will not be open to the public per F.S. 119.071 relating to House Bill 7223.

Sumter County will provide a projector and a projector screen. All other equipment or hand-outs must be provided by the presenting firm. If a firm does bring handouts a total of five (5) are required.

The scoring criteria listed below will be used by the Selection Committee following vendor presentations as follows if required:

### Vendor Presentations Evaluation Scoring Criteria

<table>
<thead>
<tr>
<th>Score</th>
<th>X</th>
<th>Weight</th>
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</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td></td>
<td>.45</td>
<td>2.25</td>
</tr>
<tr>
<td>4</td>
<td></td>
<td>.15</td>
<td>.60</td>
</tr>
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<td>.60</td>
</tr>
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<td>4</td>
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<td>5</td>
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<td>.75</td>
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**SIGN IN SHEET**

**DATE:** 1-22-19  
**TIME:** 9:00 am  Rm 208

**BID/RFP/RFQ NAME:** KFP 005-0-2019/18

- Pre-Bid/Proposal/Qualifications Meeting
- Bid/RFP/RFQ Opening
- Selection Committee Meeting
- Vendor Presentations / Selection Committee Meeting

**Please list all the companies you are representing beside your name.**

<table>
<thead>
<tr>
<th>NAME</th>
<th>COMPANY</th>
</tr>
</thead>
<tbody>
<tr>
<td>Becky Segrest</td>
<td>BCC Purchasing</td>
</tr>
<tr>
<td>Emily Merriou</td>
<td>BCC Purchasing</td>
</tr>
<tr>
<td>Jordan Bailey</td>
<td>BCC Purchasing</td>
</tr>
<tr>
<td>Joseph Duennes</td>
<td>BCC Development Services</td>
</tr>
<tr>
<td>Karl Hollie</td>
<td>BCC Dev. Ser</td>
</tr>
<tr>
<td>Matt Rush</td>
<td>Bureau Veritas</td>
</tr>
<tr>
<td>Michelle Acosta</td>
<td>Bureau Veritas</td>
</tr>
<tr>
<td>Kitty Fields</td>
<td>BCC Employee Services</td>
</tr>
</tbody>
</table>
SIGN - IN SHEET

DATE: 1-8-2-19

TIME: 10:00 am  Rm 208

BID/RFP/RFQ NAME: RFP 005-0-2019/RS

- Pre-Bid/Proposal/Qualifications Meeting
- Bid/RFP/RFQ Opening
- Selection Committee Meeting
- Vendor Presentations / Selection Committee Meeting

Please list all the companies you are representing beside your name.

NAME                  COMPANY

Becky Segrest         BOCB Purchasing
Joseph F. Quinones   BOCB Development Services
Karl Holley           BOCB Dev. Serv.
Jordan Bailey         BOCB Purchasing
Emily Minus          BOCB Purchasing
M. T. Canaday        M. T. Canaday
Abigail Watts        M. T. Canaday
SIGN IN SHEET

DATE: 1-22-19

TIME: 11:00 a.m. Rm 208

BID/RFP/RFQ NAME: RFP 005-0-2019RS

- Pre-Bid/Proposal/Qualifications Meeting
- Bid/RFP/RFQ Opening
- Selection Committee Meeting
- Vendor Presentations / Selection Committee Meeting

Please list all the companies you are representing beside your name.

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<td>Bocc Development Services</td>
</tr>
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</tr>
<tr>
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</tr>
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</tr>
</tbody>
</table>

(Additional companies listed below)

(Additional companies listed below)

(Additional companies listed below)

(Additional companies listed below)
Bureau Veritas

Beginning at 9:00 A.M.

9:00 to 9:05 – Set Up
9:05 to 9:35 – Presentation
9:35 to 9:50 – Q & A
9:50 to 9:55 – Wrap Up Presentation

M.T. Causley, LLC

Beginning at 10:00 A.M.

10:00 to 10:05 – Set Up
10:05 to 10:35 – Presentation
10:35 to 10:50 – Q & A
10:50 to 10:55 – Wrap Up Presentation