



**Request for Qualifications  
Facility Assessment  
RFQ 2023-021  
Town of Salem NH**

**June 2023**

**SALEM PURCHASING**

Gia Faccadio, Purchasing Agent

Nicole McGee, Finance Director

**Christopher Dillon, Town Manager**

*MBAC – Municipal Buildings Advisory Committee*

**TOWN OF SALEM**

**NEW HAMPSHIRE**

**REQUEST FOR QUALIFICATIONS**

The Town of Salem is seeking qualification-based proposals from firms for professional services for the following:

**RFQ 2023-021 FACILITY ASSESSMENT**

Facility firms are invited to submit qualification-based proposals for professional services associated with a Facility Assessment of the Senior Center located at 1 Sally Sweets Way. The Town of Salem is seeking to select and contract with a qualified firm for services that include but are not limited to: assess the overall condition of structures and use a facility condition index or similar method to provide a basis for analysis of the condition of the buildings, evaluate code issues including ADA, accessibility, mechanical, electrical, plumbing, communication, and fire protection systems and make recommendations for improvements, and assess the structural components and envelope features of each building such as roofing, siding, windows and doors, and make recommendations for improvements. The town seeks a firm readily available to perform on-site, fast-track, existing conditions analysis and assessment for funding schedules starting in the calendar year 2024.

Proposals are welcomed and will be received by the Gia Faccadio, Procurement and Purchasing Agent - Town of Salem, New Hampshire on or before **August 10, 2023, 1:00 PM** at the Finance Department, Town Hall, 33 Geremonty Avenue, Salem, NH 03079.

One (1) signed original hard copy, four (4) separate hard copies, and one (1) electronic copy (in PDF format on a portable USB flash drive) of the qualifications proposal which shall be submitted in a secure package clearly marked **"RFQ 2023-021 FACILITY ASSESSMENT"**

Proposals delivered after the appointed time and date will not be considered.

General information, proposal instructions, and the scope of work are available at the Town Purchasing Department Website:

[Current Bids, Proposals and Awards | Salem NH \(townofsaalemnh.org\)](https://townofsaalemnh.org/CurrentBidsProposalsandAwards)

The Town of Salem NH reserves the right to reject any and all proposals or parts of proposals; to waive any defects, information, and minor irregularities; to accept exceptions to these specifications; to award contracts or to cancel this Request for Qualifications if it is in the Town's best interest to do so.

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## 1. Introduction

The Town of Salem (TOWN) invites proposals from qualified firms (CONSULTANT) for professional services associated for a Facility Assessment of the Senior Center located at 1 Sally Sweets Way. CONSULTANTS are requested to submit their proposals to Gia Faccadio, Procurement and Purchasing Agent, at the Town Hall, 33 Geremonty Drive, Salem, NH 03079 in accordance with the instructions contained within this Request for Qualifications (RFQ).

Notice of this RFQ will be published on Friday, June 23, 2023, in the Lawrence Eagle Tribune (weekly daily newspaper covering the Merrimack Valley and Essex County, Massachusetts, and southern New Hampshire), Union Leader (weekly daily newspaper of Manchester NH and covering southern New Hampshire), and posted on the TOWN website:

[Current Bids, Proposals and Awards | Salem NH \(townofsalemnh.org\)](https://www.townofsalemnh.org/CurrentBidsProposalsandAwards)

The TOWN will accept proposals delivered in person or by mail – NO EMAIL. All proposals must be received by **1:00 p.m. on August 10, 2023**, to be considered. **Proposals submitted by fax or email will not be considered.** One (1) signed original hard copy, four (4) separate hard copies, and one (1) electronic copy (in PDF format on a portable USB flash drive) of the qualification's proposal shall be submitted in a secure package. All proposals must be submitted to:

Town of Salem NH  
RFQ 2023-021  
Facility Assessment  
Attn: Purchasing Office  
33 Geremonty Drive  
Salem, NH 03079

This is not a price competition, but rather the TOWN's decision will be based upon CONSULTANTS qualifications and experience with similar projects. The TOWN will evaluate proposals and enter negotiations with the highest scoring proposer. If unsuccessful, the TOWN may attempt to negotiate with the second highest scoring proposer. CONSULTANT's must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager must be licensed and registered as an architect or professional engineer with a minimum of five years of experience and must have worked in the assessment of municipal buildings preferably in New Hampshire or Massachusetts.

The TOWN reserves the right to reject any and all proposals or parts of proposals; to waive any defects, information, and minor irregularities; to accept exceptions to these specifications; to award contracts or to cancel this RFQ if it is in the TOWN's best interest to do so.

## 2. Submission Deadline and Instructions

CONSULTANTS are requested to submit proposals clearly marked "**RFQ 2023-021 FACILITY ASSESSMENT**" with the CONSULTANT's name and address on the front. One (1) signed original hard copy, four (4) separate hard copies, and one (1) electronic copy (in PDF format on a portable USB flash drive) of the qualification's proposal shall be submitted in a secure package. **Proposals submitted by fax or email will not be considered.**

CONSULTANT's must also execute and include in the sealed submission, the Non-Collusion Statement, Acknowledge Addendum (if applicable), and the Tax Certificate W-9 form. All proposals become the property of the Town of which has the right to disclose information contained in the proposals once awards have been made.

All outer envelopes/packages must be labeled **"RFQ 2023-021 FACILITY ASSESSMENT"** with the CONSULTANT's name and address on the front, addressed to:

Town of Salem NH  
RFQ 2023-021  
Facility Assessment  
Attn: Purchasing Office  
33 Geremonty Drive  
Salem, NH 03079

No proposals will be accepted after the time and date noted. Late delivery of materials due to any type of delivery system shall be cause for rejection. Proposals must be signed through the Cover letter (Section 9a) by the individual, partner, or designated representative for the CONSULTANT who is authorized to enter into contracts. Proposals may be dropped off in person at the front counter or the front entrance lobby in Town Hall. There is a drop box located outside of the front entrance for off/after hour deliveries.

### **3. Questions, Addendum, or Proposal Modification**

Questions concerning this RFQ must be submitted in writing or email to the TOWN Contact Person:

Gia Faccadio, Purchasing Agent  
33 Geremonty Drive  
Salem, NH 03079  
Email: [gfaccadio@salemnh.gov](mailto:gfaccadio@salemnh.gov)

Questions/inquiries must be received by 5:00 p.m. on July 17, 2023 to be considered. Questions/inquiries may be delivered, mailed, or emailed. Written responses will be posted on the TOWN's website: [Current Bids, Proposals and Awards | Salem NH \(townofsalemnh.org\)](https://www.townofsalemnh.org) by Addendum by 5:00 p.m. on July 20, 2023. Emailed questions must be as follows in subject line to be answered:

#### ***"RFQ 2023-021 Question"***

If any changes are made to this RFQ, an Addendum will be posted on the TOWN's website. It is the sole responsibility of the CONSULTANT to ascertain the existence of any addenda and/or modifications issued by the TOWN. As this RFQ has been published on the TOWN's website, all CONSULTANTS are responsible for checking the website for any addenda and /or modifications that are subsequently made to this RFQ.

The TOWN accepts no liability for and will provide no accommodations to CONSULTANTS who fail to check for addendums and/or modifications to this RFQ and subsequently submit inadequate or incorrect proposal.

All proposals submitted in response to this RFQ shall remain firm for sixty (60) days following the submittal deadline. It is anticipated that the contract will be awarded within thirty (30) days after the submittal deadline.

The CONSULTANT is not to communicate directly with any employee of the TOWN, except as specified in this RFQ and no other individual employee or representative is authorized to provide any information or respond to any question or inquiry concerning this RFQ.

The CONSULTANT may communicate with the Contact Person (Gia Faccadio) for this RFQ in the event this RFQ is incomplete, or the bidder is having trouble obtaining any part of the RFQ electronically through the Town website including, and without limitation, any form and/or attachments.

#### **4. Modifications to Proposal**

The CONSULTANT may correct, modify, or withdraw a proposal by written notice received by the TOWN prior to the time and date set for the proposal opening. Proposal modifications must be submitted in a sealed envelope clearly labeled "Modification No. \_\_\_\_\_." Each modification must be numbered in sequence and must reference the original RFQ.

#### **5. Pre-Proposal Conference/Briefing**

There will be no scheduled pre-proposal walk through for this project.

#### **6. General Project Narrative**

The Town of Salem New Hampshire, Municipal Services Department, is requesting qualifications from firms that provide facility assessments and/or audits on municipally owned buildings. Initial award of work will include the Senior Center however future work may be expanded to include other buildings under the purview of the Municipal Buildings Advisory Committee. The chosen firm will be expected to establish a strategic plan for each facility that encompasses all elements ranging from maintenance to major capital planning. The plan will prioritize and categorize all necessary elements that provide sustainability for the buildings, i.e., short-term, middle-term, and long-term. The facility assessment/audit will help eliminate any unknowns and provide a clear picture of the vitality of the building and its systems and define a schedule of repairs or upgrades that can be budgeted accordingly. The assessment, among other things, shall evaluate the building's condition and code compliance as well as the performance and age of all finishes, systems, and equipment.

Firms will be expected to bring a deep understanding of and experience with audits within the public sector for facility purposes. Recent or current work for municipalities will be considered strongly along with robust experience and professional staff. The town seeks a firm with local ready availability to perform on-site, fast-track, existing conditions analysis and assessment for funding schedules starting in calendar year 2024. The deliverables shall include a comprehensive report including a capital plan with opinion of cost established to be presented before boards and committees.

Each applicant must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager with a minimum of five years of experience and must have worked in the assessment of municipal buildings preferably in New Hampshire or Massachusetts. Submittals will be allowed to include engaging the services (partnering) of other licensed engineers and consultants, such as electrical, HVAC, and other professionals as needed to complete the qualifications package.

CONSULTANT will also be procured, if requested, to draft bid documents and specifications for all building envelope related items so it is imperative that experience thereof is demonstrated in the submission.

## **7. Scope of Work**

- Assess the overall condition of structures and use a facility condition index or similar method to provide a basis for analysis of the condition of the buildings.
- Evaluate code issues including ADA, accessibility, mechanical, electrical, plumbing, communication, and fire protection systems and make recommendations for improvements. A cost estimate for each recommendation is required.
- Assess the structural components and envelope features of each building such as roofing, siding, windows and doors, and make recommendations for improvements.
- Assess interior finishes including walls, ceilings, flooring and signage.
- Evaluate, identify, and inventory mechanical systems including heating, cooling, exhaust, ventilation, and controls.
- Evaluate electrical systems including capacity, distribution, and lighting.
- Evaluate plumbing systems including water and sewer.
- Evaluate all relative utility bills if applicable to ensure and provide cost saving measures.
- Identify recommendations for energy efficiency upgrades that may be eligible for rebates or other incentives including consumption reduction.
- Conduct a site evaluation including drainage, parking, and accessibility, etc.
- The cost estimates used in the capital plan must be developed using current construction estimating methods.
- Conduct a survey of the facilities to determine the extent of deferred maintenance. The survey will include a physical inspection of each piece of equipment.
- An Asset Condition Database Inventory in Excel format that allows for the collection and management of the related data shall be prepared.
- Deferred maintenance/deficiencies shall be prioritized using the following categories:
  - Priority One - Immediate and/or Short-Term Concerns (1-3 years) which should be undertaken immediately including violations of life safety, building and electric codes.
  - Priority Two - Middle Term Concerns (3-5 years). Should be corrected in the near future to maintain the integrity of the building, including systems that are not functioning properly or not at all and problems that if not addressed cause additional deterioration.
  - Priority Three: Long Term Concerns (5-10 years). Should be corrected in the more distant future to maintain the integrity of the building, including systems that have exceeded their expected useful life, but are still functioning.

- The firm shall prepare estimates to repair or replace all deferred maintenance items and capital expenditures using industry standard cost estimating data such as R.S. Means or equivalent. In some cases, an actual quotation for an approved contractor may be required.
- The Facilities Condition Assessment report will be delivered in hard copy and electronic copy and will include the following data and analysis: asset catalog, deferred maintenance detail with photographs and cost estimates for each facility surveyed, and recommended capital improvement plan.
- Design and reallocation of space will be reviewed as warranted to the department's needs and mission.
- A presentation before the Board of Selectmen should be considered along with one (1) additional public presentation.

## 8. Minimum Qualifications

Each CONSULTANT must demonstrate that it meets the following minimum qualifications:

- a) The CONSULTANT shall be a firm that must be licensed and registered as an architect or professional engineer and/or professional general contractor/project manager with a minimum of five years of experience and must have worked in the assessment of public buildings preferably in New Hampshire or Massachusetts.
- b) The CONSULTANT shall have completed or been involved in at least five (5) projects that were for municipal buildings that included facility assessment, capital budgeting, estimating, and/or maintenance, rehabilitation, bid and specification preparation documents, or remodeling of buildings.
- c) Possess all necessary current licenses and registrations, either within the firm or through sub-contracted consultants, to perform the work.
- d) Provide evidence of insurance for general liability, automobile, worker's compensation (statutory) and professional services liability, as required.

Comprehensive General Liability	\$ 1,000,000/\$ 3,000,000
Auto Liability: Property Damage	\$ 1,000,000/\$ 1,000,000
Personal Injury	\$ 1,000,000/\$ 3,000,000
Workmen's Compensation	as required by the State of New Hampshire

- e) Provide a completed facility assessment that was deliverable to a municipality.
- f) The CONSULTANT shall comply with all applicable federal, state, and local laws and regulations and must not be debarred from State or Federal projects.
- g) Complete submission of required statements and forms.



## 9. Qualifications Based Proposal

The CONSULTANT shall submit One (1) signed original hard copy, four (4) separate hard copies, and one (1) electronic copy (in PDF format on a portable USB flash drive) of the qualification's proposal and requested completed facility assessment (Section 9h). The five (5) submissions shall be bound and not have any loose pages or material. Each section of criteria shall be its own, i.e., a new section should not begin on the backside of the previous section. Double sided pages count as two pages. The one (1) electronic copy shall be identical to the physical proposal including a separate document for the Completed Facility Assessment described below in Section 8h. There shall be no additional or promotional items included and/or as separate documents on the flash drive. Text should be sized eleven (11) or better for main wording while footnotes or picture text if applicable can be as small as eight (8).

The proposal should be as follows:

- a) **Cover Letter – one (1) page:** A Cover Letter identifying the CONSULTANT, their place of business, name, and telephone number of the person to contact regarding the subject RFQ. The Cover Letter shall be authored and signed by an individual, partner, or designated representative of the CONSULTANT that is sanctioned to enter into contracts – This is the One (1) signed original hard copy whereas the other ten (10) may be copies. The Cover Letter should be formal and intelligible yet clearly demonstrate the CONSULTANT's candidacy for this request.
- b) **Knowledge and Experience – one (1) page:** This should be a more detailed narrative from the CONSULTANT of qualifications that includes a summary of experience specifically addressing Section 7 of this this request.
- c) **Team Lead – one (1) page:** A resume for the CONSULTANT'S designee to be placed in charge of managing the services included in the RFQ and who will be the direct point of contact with the TOWN. The resume may include experiences or accomplishments of the designee at a previous employer however the TOWN would prefer that the designee have at least been Team Lead on a minimum of two (2) projects in whole for the CONSULTANT.
- d) **Key Personnel – one (1) page:** Additional staff employed by the CONSULTANT that will be utilized for any or all specific services included in the RFQ. Please illustrate strengths, licenses, and certifications of which may include experiences or accomplishments by Key Personnel at a previous employer.
- e) **Subcontractors – one (1) page:** Include professional subcontractors that the CONSULTANT has used, will use, worked for or collectively with on similar projects.
- f) **Projects - Facility Assessments – five (5) pages maximum:** This should be a more detailed narrative from the CONSULTANT describing and establishing the requirements detailed in Section 8b of this request. Projects completed are NOT limited to New Hampshire or Massachusetts.

- g) **References – one (1) page:** A list of not less than five relevant references must be included. References may be contacted after selection to determine if the CONSULTANT is responsive and responsible.
- h) **Completed Facility Assessment – USB Flash Drive.** An electronic copy only of a previously completed facility assessment as a deliverable to a municipality.

The CONSULTANT shall include one (1) signed acknowledgement of the following respectively to be included in the submission separate from the bound Qualifications Proposal:

- NON-COLLUSION STATEMENT
- ACKNOWLEDGEMENT OF ADDENDUM (IF APPLICABLE)
- COMPLETED AND SIGNED W-9

## 10. Comparative Evaluation Criteria

All proposals will be evaluated based upon the specific comparative evaluation criteria. The following point schedule will be utilized:

<b><i>Highly Advantageous*</i></b>	3-5 points	Response excels on the specific criterion
<b><i>Advantageous</i></b>	2 points	Response meets evaluation standard for the criterion
<b><i>Least Advantageous</i></b>	1 point	Response does not fully meet the criterion or leaves a question or issue not fully addressed
<b><i>Does Not Meet</i></b>	0 points	Does not address the criterion

\* The CONSULTANT is reminded of the following in Section 8b: "***preferably municipal buildings***"

The following will be evaluated and scored accordingly:

- a) **Qualifications Based Proposal** - Quality of submission by CONSULTANT to clearly illustrate its ability, submission readability, correct use of grammar and syntax, responsiveness to format and instructions of the RFQ, and understanding of the TOWN's request.
- **Highly Advantageous** - Provided a professionally organized proposal following all guidelines for format and materials. The proposal was comprehensive yet readable meeting all understanding of the RFQ and established the ability of the CONSULTANT.
  - **Advantageous** – Provided a professionally organized proposal meeting most guidelines for format and materials. The proposal was comprehensive but consuming and challenging to read meeting most understanding of the RFQ. Mostly established the ability of the CONSULTANT.
  - **Least Advantageous** – Provided an inadequate proposal that missed most of the guidelines for format and materials. Proposal struggled to meet the understanding of the RFQ and failed to establish the ability of the CONSULTANT.
  - **Does Not Meet** – Proposal did not demonstrate an understanding of the RFQ.
- b) **Knowledge and Experience** – The CONSULTANT shall be a firm who must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager with a minimum of five years of experience and must have worked in the assessment of municipal buildings preferably in New Hampshire or Massachusetts and who has at least five (5) years' experience all-inclusive of facility assessments including capital plan for each facility that encompasses all elements ranging from maintenance to major expenditures.
- **Highly Advantageous** – The CONSULTANT shall be a firm who must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager is registered by the State of New Hampshire and who has more than fifteen (15) years' experience of all-inclusive of qualifications requested.
  - **Advantageous** – The CONSULTANT shall be a firm who must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager and who has six (6) to fifteen (15) years' experience of all-inclusive of qualifications requested.
  - **Least Advantageous** – The CONSULTANT shall be a firm who must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager and who has five (5) years' experience of all-inclusive of qualifications requested.
  - **Does Not Meet** – The CONSULTANT shall be a firm who must be licensed and registered as an architect or professional engineer and/or professional general contractor/ project manager and who has less than five (5) years' experience of all-inclusive of qualifications requested.
- c) **Team Lead** - A resume for the CONSULTANT'S designee to be placed in charge of managing the services included in the RFQ and who will be the direct point of contact with the TOWN. The resume may include experiences or accomplishments of the designee at a previous employer however the TOWN would prefer that the designee have at least been Team Lead on a minimum of two projects in whole for the CONSULTANT.

- **Highly Advantageous** – The CONSULTANT’s **Team Lead** is a licensed professional engineer and/or architect, estimator, and who has more than ten (10) years’ experience of all-inclusive of qualifications requested, has been involved directly as a lead role in seven (7) or more projects, including at least four (4) projects as an employee of the CONSULTANT.
  - **Advantageous** – The CONSULTANT’s **Team Lead** is a licensed professional engineer and/or architect, estimator, and who has more than seven (7) years’ experience of all-inclusive of qualifications requested, has been involved directly as a lead role in five (5) or more projects, including at least three (3) projects as an employee of the CONSULTANT.
  - **Least Advantageous** – The CONSULTANT’s **Team Lead** is a licensed professional engineer and/or architect, estimator, and who has more than five (5) years’ experience of all-inclusive of qualifications requested, has been involved directly as a lead role in three (3) or more projects, including at least two (2) projects as an employee of the CONSULTANT.
  - **Does Not Meet** – The CONSULTANT’s **Team Lead** is a licensed professional engineer and/or architect, estimator and who has more than five (5) years’ experience of all-inclusive of qualifications requested, has been involved directly as a lead role in two (2) or more projects, including at least one (1) project as an employee of the CONSULTANT.
- d) **Key Personnel** - Additional staff employed by the CONSULTANT that will be utilized for any or all specific services included in the RFQ. Please illustrate strengths, licenses, and certifications of which may include experiences or accomplishments by Key Personnel at a previous employer.
- **Highly Advantageous** – The CONSULTANT’s **Key Personnel** include registered State of New Hampshire design professional engineers and/or architects. Cumulative experience is more than thirty (30) years and supports the full range of qualifications and specific guidelines set forth herein.
  - **Advantageous** – The CONSULTANT’s **Key Personnel** include registered State of New Hampshire design professional engineers and/or architects. Cumulative experience is more than twenty (20) years and supports the full range of qualifications and specific guidelines set forth herein.
  - **Least Advantageous** – The CONSULTANT’s **Key Personnel** include registered State of New Hampshire design professional engineers and/or architects. Cumulative experience is more than ten (10) years and supports most of the qualifications and specific guidelines set forth herein.
  - **Does Not Meet** – The CONSULTANT’s **Key Personnel** include registered State of New Hampshire design professional engineers and/or architects. Cumulative experience is less than ten (10) years and supports some of the qualifications and specific guidelines set forth herein.
- e) **Projects** - The CONSULTANT shall have completed or been involved in at least ten (10) facility assessment projects that were for buildings, at least five (5) projects that were for municipal buildings.
- **Highly Advantageous** – The CONSULTANT has completed or been involved at least ten (15) or more facility assessments that were for buildings including five (5) or more municipal facilities.

- **Advantageous** – The CONSULTANT has completed or been involved in five (5) to nine (9) projects that were for buildings including four (4) or more municipal facilities.
  - **Least Advantageous** – The CONSULTANT has completed or been involved in at least five (5) projects that were for buildings including at least two (2) municipal facilities.
  - **Does Not Meet** – The CONSULTANT has completed or been involved in less than (5) projects that were for buildings including one (1) municipal facility.
- f) **Completed Facility Assessment – PDF Document on the USB Drive:** A PDF of a Facility assessment that was previously done by the CONSULTANT to present a project to a respective town committee, town boards, public, and other interested parties.
- **Highly Advantageous** – The CONSULTANT’s presentation was professionally done, technical but precise, informative, and specific to the objective and the audience.
  - **Advantageous** – The CONSULTANT’s presentation was professionally done, somewhat technically challenging, informative, met the objective and the audience.
  - **Least Advantageous** – The CONSULTANT’s presentation was professionally done, overly technical, rambling, met the objective but may have lost the audience.
  - **Does Not Meet** – The CONSULTANT’s presentation was unprofessional and misguided, overly technical, and too long.

## 11. Awarding of Contract

The TOWN, at its sole discretion, may schedule interviews with the three highest CONSULTANTS. In lieu of the interview process, The TOWN may elect to commence negotiations with the highest qualified CONSULTANT. The TOWN will rank the CONSULTANTS based on consideration of the minimum criteria/qualifications, the comparative evaluation criteria, and the interview (if applicable).

The TOWN will begin discussion of final scope of services and fee negotiations with the top ranked CONSULTANT. If unsuccessful in the negotiations, the TOWN may attempt to negotiate with the next higher scoring CONSULTANT (and repeat that process) until successful. If negotiations with one or more of the finalists prove unsuccessful, the TOWN may reject all proposals and may choose to readvertise the RFQ if deemed in the best interest to do so. It is the TOWN’s intent to finalize a professional services agreement and commence work as needed.

## **APPENDIX A**



## **NON-COLLUSION STATEMENT**

### **"RFQ 2023-021 FACILITY ASSESSMENT"**

The Undersigned certifies, under penalties of perjury, that this proposal in all respects is authentic, accurate, and made without collusion or fraud with any other person. As used in this paragraph, the "person" shall mean any natural person, joint venture, partnership, corporation or other business or legal entity.

Title\_\_\_\_\_

Signature\_\_\_\_\_

Company\_\_\_\_\_

## **APPENDIX B**





## **ACKNOWLEDGEMENT OF RECEIPT OF ADDENDUM**

### **"RFQ 2023-021 FACILITY ASSESSMENT"**

Acknowledgement of receipt of Addendum # \_\_\_\_\_ through  
(date) \_\_\_\_\_, 2023

Acknowledgement of receipt of Addendum # \_\_\_\_\_ through  
(date) \_\_\_\_\_, 2023

Acknowledgement of receipt of Addendum # \_\_\_\_\_ through  
(date) \_\_\_\_\_, 2023

Acknowledgement of receipt of Addendum # \_\_\_\_\_ through  
(date) \_\_\_\_\_, 2023

Title \_\_\_\_\_

Signature \_\_\_\_\_

Company \_\_\_\_\_

## **APPENDIX C**

# Request for Taxpayer Identification Number and Certification

Give Form to the  
requester. Do not  
send to the IRS.

► Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
	2 Business name/disregarded entity name, if different from above	
	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.  <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ <b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):  Exempt payee code (if any) _____  Exemption from FATCA reporting code (if any) _____  <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) See instructions.	Requester's name and address (optional)
	6 City, state, and ZIP code	
	7 List account number(s) here (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. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
				-			-		
or									
Employer identification number									
				-					

## Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

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

Sign Here	Signature of U.S. person ►	Date ►

## 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](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-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-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.