



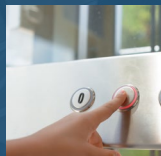
Safety. Compliance. Performance.

Due Date: January 26, 2023 at 3:30 PM (EST)

Jefferson Parish

Professional Consulting Services

Bid No. 0452



Prepared for:

Jefferson Parish
200 Derbigny St, Suite 4400
Gretna LA, 70053
Attn: Donna Evans

Prepared by:

ATIS Elevator Inspections, LLC
600 Emerson Road, Suite 225
Creve Coeur, Missouri 63141

January 26, 2023,

Jefferson Parish

200 Derbigny St, Suite 4400, Gretna LA, 70053

Attention: Donna Evans

Dear Mrs. Evans

ATIS Elevator Inspections, LLC (ATIS) proposes to provide Jefferson Parish with elevator consulting services as presented in Request for Proposal #23010

ATIS has the largest dedicated team of vertical transportation inspectors and consultants in the United States, which consists of more than 170 licensed Qualified Elevator Inspectors (QEIs), Professional Engineers, a proprietary inspection and certificate management database, and over 100 back-office support personnel who work together to deliver timely and reliable consulting, inspection, test witnessing services with integrity and professionalism.

ATIS was established in November 2012 to better serve the elevator needs of facility owners, property managers, and authority having jurisdictions across the country. ATIS's vision is "People moving in a world with no conveyance related accidents," and we have 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 a customer centric disposition. We encourage constructive feedback as we continuously strive to improve the customer experience.

Additionally, Jefferson Parish will receive the benefit of ATIS's key core competencies, which include:

- *Unsurpassed Conveyance Expertise:* ATIS brings a team of over 140 QEI Certified Inspectors who perform third-party inspection, testing, consulting, and certification services to more than 20,000 customers. ATIS's field expertise and depth is unmatched in the industry.

- *Value-Added Services, ATIS Alert:* Our proprietary technology, ATIS Alert, 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 monitoring and notification system that can be seen in real time and assures our clients and partners that all conveyances within a building remain compliant with jurisdictional laws.
- *2018, 2019 and 2020 Inc. Magazine's Fastest Growing Private Companies:* Due to our unwavering commitment to safety and our people, we have accumulated one of the largest and most experienced elevator teams in the world, and we have been recognized as one of the fastest growing private companies in America. This further ensures that the Jefferson Parish will receive superior service from a company with sound operational and financial strength.

In this proposal, we express our firm commitment to deliver outstanding performance on behalf of the Jefferson Parish, delivering all services defined in the solicitation. Our past performance providing consulting, services similar in scope for universities 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.

On behalf of the ATIS team, I am pleased to submit the enclosed offer. We are prepared to provide an oral presentation, a system demo, and any additional information required in support of this effort.

Sincerely,

Joshua Convery

Joshua Convery
Business Development Specialist
ATIS Elevator Inspections, LLC Corporate Office
600 Emerson Road, Suite 225 Creve Coeur, MO, 63141
P: (314) 926-1414
jconvery@atis.com

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1.1 Scope of Services

Audit Inspections -

ATIS would provide a Consulting Team to audit survey the various vertical transportation units that are part of this RFP for the purpose of becoming familiar with each unit, as well as to evaluate the units for maintenance deficiencies, code deficiencies and to determine expected remaining life span. The audit surveys would include reviewing the equipment located in the machine or control rooms, tops of cars/hoistways, pits, car enclosures and lobbies, as well as any related building issues noted in these areas. It is expected that the surveys will be completed over a period of 60 days from Notice of Award. (It is assumed that there are no more than 60 units included in this RFP.)

Upon completion of surveys, ATIS shall provide written audit evaluations summarizing the findings from the audit surveys. The audit surveys and subsequent reporting shall meet the Audit/Inspection section requirements of 2.1 Scope of Work/Services of the RFP. All written evaluations shall be completed within 75 days from Notice of Award. The Consultant shall participate in a virtual meeting/conference call with the Client to review all reports.

Maintenance Agreement –

Upon completion of the Audit Inspections, the Consultant shall prepare a written Elevator Maintenance Agreement outlining all requirements of a quality vertical transportation maintenance program for the units that were audited. The Agreement shall include performance requirements for each individual unit. The Consultant shall include a 90% review submittal, as well as a Final for Bid submittal. The Consultant will participate in virtual meetings with the Client prior to commencing with the Agreement preparation and again after submission of the 95% and Final submissions to make certain all necessary details are properly addressed and the documents are ready for submission to the bidders. As part of this Maintenance Agreement work, the Consultant shall evaluate possible bidders for the work and advise the Client as to any findings. Additionally, upon obtaining bids, the Consultant shall provide a written review of the bids and make a recommendation to the Client as to the low, qualified bidder.

1.2 Specific Experience

1.2.1 Mike Shea, AIA

Vice President
Ross and Baruzzini
6 South Old Orchard
St. Louis, Missouri 63119
(314) 918-8383

1.2.2 Marsha Smith

Health Facilities Managing Engineer
University of Missouri - Planning, Design & Construction
1 Hospital Drive, DC 404.10
Columbia, MO 65212
(573) 884-0861

1.2.3 Mike Stachowski

Manager, Facilities Engineering
Barnes-Jewish Hospital
Mail Stop 90-31-698
One Barnes-Jewish Hospital Plaza
St. Louis, Missouri 63110
(314) 747-5674

1.2.4 Joe Zummo

Peabody Hotel
149 Union Avenue
Memphis, Tennessee 38103
(901) 529-4125

1.3 Key Personnel



STATEMENT OF QUALIFICATION

DAVID J. HARDIN - ELEVATOR CONSULTANT

EDUCATIONAL BACKGROUND

B.S. degree in Business Management, Southern Illinois University at Edwardsville, 1988.

Professional Member of the International Association of Elevator Consultants (IAEC).

Certified by the National Association of Elevator Safety Authorities (NAESA) as a Qualified Elevator Inspector (QEI), certification no. C2658, having met all academic and practical requirements. NAESA is accredited by American National Standards Institute.

Accredited by the State of Missouri, Department of Public Safety, Division of Fire Safety, as a Licensed Elevator Inspector, License No. 73.

Accredited by the State of Illinois, Office of the State Fire Marshall, Elevator Safety Division, as a Licensed Elevator Inspector, License No. IL03379.

WORK EXPERIENCE

August 2020 – Present
National Consulting Co-Director
Responsibilities include overseeing the national consulting efforts on behalf of ATIS, a national elevator inspections and management firm.

ATIS Elevator Inspections LLC, Consulting Division
Valley Park, Missouri

2002 – August 2020
Elevator Consultant / Principal
Responsibilities include elevator analysis and design of elevator systems for new buildings, renovations of elevators in existing buildings, code compliance evaluations (including ADA), preparation of specifications for new installations and existing renovations, final acceptance inspections of elevator work upon completion of the job, elevator inspections for maintenance contract conformance, and the preparation of elevator maintenance contracts.

Kenneth H. Lemp Elevator Consultant, Inc.
Valley Park, Missouri

2001 – 2002
New Equipment Sales Manager
Responsibilities included management of all elevator construction and modernization sales on behalf of a major elevator manufacturer. Tasks include management of sales team, project estimating, proposal generation, job surveying, blueprint and specification reviews, and general marketing tasks.

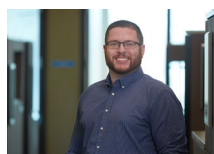
ThyssenKrupp Elevator
St. Louis, Missouri

1999 - 2001
District Construction Sales Manager
Responsibilities included managing and directing elevator construction sales for Southern Illinois, Missouri and Kansas.

Thyssen Elevator
St. Louis, Missouri

1995 – 1999
New Equipment Sales Representative
Responsibilities included elevator construction and modernization sales on behalf of a major elevator manufacturer.

U.S. Elevator Corp.
St. Louis, Missouri



STATEMENT OF QUALIFICATION

ZACH PERRY - ELEVATOR CONSULTANT

EDUCATIONAL BACKGROUND

B.S. degree in Mechanical Engineering, Missouri University of Science & Technology, May 2013.

Registered Professional Engineer, State of Missouri, Certification No. 2021041536

Certified by the National Association of Elevator Safety Authorities (NAESA) as a Qualified Elevator Inspector (QEI), certification no. C5865, having met all academic and practical requirements. NAESA is accredited by American National Standards Institute.

Accredited by the State of Missouri, Department of Public Safety, Division of Fire Safety, as a Licensed Elevator Inspector, License No. 302.

Accredited by the State of Illinois, Office of the State Fire Marshall, Elevator Safety Division, as a Licensed Elevator Inspector, License No. IL05426.

Member of National Association of Elevator Safety Authorities (NAESA).

WORK EXPERIENCE

August 2020 – Present	ATIS Elevator Inspections LLC, Consulting Division.
Elevator Consultant	Valley Park, Missouri

Responsibilities include elevator analysis and design of elevator systems for new buildings, renovations of elevators in existing buildings, code compliance evaluations (including ADA), preparation of specifications for new installations and existing renovations, final acceptance inspections of elevator work upon completion of the job, elevator inspections for maintenance contract conformance, and the preparation of elevator maintenance contracts.

Jan. 2016 – August 2020	Kenneth H. Lemp Elevator Consulting, Inc.
Elevator Consultant	Valley Park, Missouri

Responsibilities include elevator analysis and design of elevator systems for new buildings, renovations of elevators in existing buildings, code compliance evaluations (including ADA), preparation of specifications for new installations and existing renovations, final acceptance inspections of elevator work upon completion of the job, elevator inspections for maintenance contract conformance, and the preparation of elevator maintenance contracts.

2013 – 2016	United States Steel
Casting Production Foreman	Granite City, Illinois

Responsibilities included management of multiple steel producing operations, employee safety, cost identification and reductions, heavy machine maintenance, and process trouble shooting.



STATEMENT OF QUALIFICATION

SEAN MCLAUGHLIN - ELEVATOR CONSULTANT

EDUCATIONAL BACKGROUND

B.S. degree in General Business, Missouri State University, 2011.

Masters of Business Administration, Missouri State University, 2012.

Certified by the National Association of Elevator Safety Authorities (NAESA) as a Qualified Elevator Inspector (QEI), Certification No. C-6826, having met all academic and practical requirements. NAESA is accredited by American National Standards Institute.

Accredited by the State of Missouri, Department of Public Safety, Division of Fire Safety, as a Licensed Elevator Inspector, License No. 364

Accredited by the State of Illinois, Office of the State Fire Marshall, Elevator Safety Division, as a Licensed Elevator Inspector, License No. IL06490

WORK EXPERIENCE

February 2021 – Present
Elevator Consultant

ATIS Elevator Inspections LLC, Consulting Division
Valley Park, Missouri

Responsibilities include elevator analysis and design of elevator systems for new buildings, renovations of elevators in existing buildings, code compliance evaluations (including ADA), preparation of specifications for new installations and existing renovations, final acceptance inspections of elevator work upon completion of the job, elevator inspections for maintenance contract conformance, and the preparation of elevator maintenance contracts.

August 2017 – January 2021
New Equipment Sales

ThyssenKrupp Elevator
St. Louis, Missouri

Responsibilities included elevator construction sales on behalf of a major elevator manufacturer. Tasks included project estimating, proposal generation, job surveying, blueprint and specification reviews, and contract pricing/terms negotiation.

October 2013 – July 2017
General Manager

Fastenal
Herculaneum, MO

Managed employees at a local branch selling industrial supplies to businesses. Responsibilities included developing sales plans, managing inventory, creating quotations and invoices, purchasing from vendors, and hiring/training employees.

1.4 Innovative Concepts

How the Contractor will control quality of services and reports.

In order to effectively complete this project, we will dedicate one of our Regional Manager as a Project Manager, one administrative employee as your scheduler and Customer Service Representative, and one managing customer invoicing work performed under this contract, and up to three experienced inspectors to perform the inspection and test-witnessing services. Since all of these individuals are employees, we are well-positioned to efficiently and thoroughly complete the work specified in this solicitation. All communications will be handled proactively, with Mr. Ralph Flory being notified a minimum of 7 calendar days prior to the scheduled service. Our inspectors have all the required tools in order to complete the inspections. When Deficiencies are found our inspectors will contact Ralph Flory via phone at 412-488-2052 and follow up the call with an email explaining the deficiencies within 24 hours.

A training program to ensure that Contractor employees are capable of successfully accomplishing all work task(s) under this contract.

All of our employees or contractors assigned to this job will have the necessary training and education required to be a Certified Elevator Inspector as well as hold a valid certification through the accredited organizations National Association of Elevator Safety Authorities (NAESA) or the Qualified Elevator Inspector Training Fund (QEITF) as well as their state licenses through the Pennsylvania Department of Labor and Industry.

How the Contractor shall maintain schedule and manage coordination of tests.

Donna Larkin has over 30 years of experience in the elevator inspection business. Her duties and responsibilities have included scheduling, coordinating, billing, accounts receivable, and customer service. She is very familiar with the major elevator companies (Kone, ThyssenKrupp, Otis, and Schindler) as well as many independent elevator companies and has the experience it takes to effectively coordinate, schedule, track, and deliver timely and reliable inspection services. Using our Company's scheduling software, email, and cell phones, we will be in constant contact with the inspectors and elevator companies' personnel to ensure changes to the schedule are effectively communicated.

How the Contractor will distribute forms including updated forms which may follow during the contract.

Each of our field inspectors and the home office maintain electronic and hardcopy copies of the required forms for this project. As updates are made, we distribute updated copies via email and U.S. mail.

1.5 Financial Profile of Company



One North Brentwood
Suite 1100
St. Louis, MO 63105

T: 314.290.3300
E: info@rubinbrown.com
www.RubinBrown.com

CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS CONSULTANTS

Independent Auditors' Report

Members
American Testing and Inspection
Services, LLC and Subsidiary
St. Louis, Missouri

Opinion

We have audited the consolidated financial statements of American Testing and Inspection Services, LLC and Subsidiary, which comprise the consolidated balance sheet as of December 31, 2021 and 2020, and the related consolidated statements of operations, members' capital, and cash flows for the years then ended, and the related notes to the consolidated financial statements.

In our opinion, the accompanying consolidated financial statements present fairly, in all material respects, the financial position of American Testing and Inspection Services, LLC and Subsidiary as of December 31, 2021 and 2020, and the results of their operations and their cash flows for the years then ended in accordance with accounting principles generally accepted in the United States of America.

Basis For Opinion

We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Our responsibilities under those standards are further described in the Auditors' Responsibilities For The Audit Of The Consolidated Financial Statements section of our report. We are required to be independent of American Testing and Inspection Services, LLC and to meet our other ethical responsibilities, in accordance with the relevant ethical requirements relating to our audits. We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Responsibilities Of Management For The Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of the consolidated financial statements in accordance with accounting principles generally accepted in the United States of America, and for the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Members
American Testing and Inspection
Services, LLC and Subsidiary

In preparing the consolidated financial statements, management is required to evaluate whether there are conditions or events, considered in the aggregate, that raise substantial doubt about American Testing and Inspection Services, LLC's ability to continue as a going concern for one year after the date that the consolidated financial statements are available to be issued.

Auditors' Responsibilities For The Audit Of The Consolidated Financial Statements

Our objectives are to obtain reasonable assurance about whether the consolidated financial statements as a whole are free from material misstatement, whether due to fraud or error, and to issue an auditors' report that includes our opinion. Reasonable assurance is a high level of assurance but is not absolute assurance and therefore is not a guarantee that an audit conducted in accordance with auditing standards generally accepted in the United States of America will always detect a material misstatement when it exists. The risk of not detecting a material misstatement resulting from fraud is higher than for one resulting from error, as fraud may involve collusion, forgery, intentional omissions, misrepresentations, or the override of internal control. Misstatements are considered material if there is a substantial likelihood that, individually or in the aggregate, they would influence the judgment made by a reasonable user based on the consolidated financial statements.

In performing an audit in accordance with auditing standards generally accepted in the United States of America, we:

- Exercise professional judgment and maintain professional skepticism throughout the audit.
- Identify and assess the risks of material misstatement of the consolidated financial statements, whether due to fraud or error, and design and perform audit procedures responsive to those risks. Such procedures include examining, on a test basis, evidence regarding the amounts and disclosures in the consolidated financial statements.
- Obtain an understanding of internal control relevant to the audit in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of American Testing and Inspection Services, LLC's internal control. Accordingly, no such opinion is expressed.
- Evaluate the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluate the overall presentation of the consolidated financial statements.
- Conclude whether, in our judgment, there are conditions or events, considered in the aggregate, that raise substantial doubt about American Testing and Inspection Services, LLC's ability to continue as a going concern for a reasonable period of time.

Members
American Testing and Inspection
Services, LLC and Subsidiary

We are required to communicate with those charged with governance regarding, among other matters, the planned scope and timing of the audit, significant audit findings, and certain internal control related matters that we identified during the audit.

RubinBrown LLP

April 27, 2022



One North Brentwood
Suite 1100
St. Louis, MO 63105

T: 314.290.3300
E: info@rubinbrown.com
www.RubinBrown.com

CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS CONSULTANTS

Independent Auditors' Report

Members
American Testing and
Inspection Services, LLC and Subsidiary
St. Louis, Missouri

Report On The Consolidated Financial Statements

We have audited the accompanying consolidated financial statements of American Testing and Inspection Services, LLC and Subsidiary, which comprise the consolidated balance sheet as of December 31, 2020 and 2019, and the related consolidated statements of operations, members' capital and cash flows for the years then ended, and the related notes to the consolidated financial statements.

Management's Responsibility For The Consolidated Financial Statements

Management is responsible for the preparation and fair presentation of these consolidated financial statements in accordance with accounting principles generally accepted in the United States of America; this includes the design, implementation, and maintenance of internal control relevant to the preparation and fair presentation of consolidated financial statements that are free from material misstatement, whether due to fraud or error.

Auditors' Responsibility

Our responsibility is to express an opinion on these consolidated financial statements based on our audits. We conducted our audits in accordance with auditing standards generally accepted in the United States of America. Those standards require that we plan and perform the audit to obtain reasonable assurance about whether the consolidated financial statements are free from material misstatement.

Members
American Testing and
Inspection Services, LLC and Subsidiary

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

Opinion

In our opinion, the consolidated financial statements referred to above present fairly, in all material respects, the financial position of American Testing and Inspection Services, LLC and Subsidiary as of December 31, 2020 and 2019, and the results of their operations and their cash flows for the years then ended, in accordance with accounting principles generally accepted in the United States of America.

RubinBrown LLP

April 26, 2021



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CERTIFIED PUBLIC ACCOUNTANTS & BUSINESS CONSULTANTS

Independent Auditors' Report

Members

American Testing and Inspection Services, LLC
and Subsidiary
St. Louis, Missouri

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Members

American Testing and Inspection Services, LLC
and Subsidiary

An audit involves performing procedures to obtain audit evidence about the amounts and disclosures in the consolidated financial statements. The procedures selected depend on the auditors' judgment, including the assessment of the risks of material misstatement of the consolidated financial statements, whether due to fraud or error. In making those risk assessments, the auditor considers internal control relevant to the entity's preparation and fair presentation of the consolidated financial statements in order to design audit procedures that are appropriate in the circumstances, but not for the purpose of expressing an opinion on the effectiveness of the entity's internal control. Accordingly, we express no such opinion. An audit also includes evaluating the appropriateness of accounting policies used and the reasonableness of significant accounting estimates made by management, as well as evaluating the overall presentation of the consolidated financial statements.

We believe that the audit evidence we have obtained is sufficient and appropriate to provide a basis for our audit opinion.

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Emphasis Of Matter

As discussed in Note 1 to the consolidated financial statements, in 2019, the entity adopted new accounting guidance for revenue recognition. Our opinion is not modified with respect to this matter.

RubinBrown LLP

April 27, 2020

1.6 Pricing

Firm Name: ATIS Elevator Inspections, LLC

Cost Proposal

	HOURLY RATE
Hourly rate for a Vertical Transportation Inspector. See section 2.0 for description	\$ 225
	SERVICES COST
Annual Elevator Audit as per section 2.0 of this RFP for Traction Elevators	\$ 1,125 Per Elevator
Annual Elevator Audit as per section 2.0 of this RFP for Hydraulic Elevators	\$ 1,125 Per Elevator
Cost to develop new Vertical Transportation maintenance and repair contracts	\$ 9000
TOTAL	\$ 65,250

1.7 Certificate of Insurance



AMERTES-01

DALBERS

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/9/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Smith McGehee 222 S. Central Suite 700 Clayton, MO 63105	CONTACT NAME: Donna Albers	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
	E-MAIL ADDRESS: dalbers@smis.com	
	INSURER(S) AFFORDING COVERAGE	NAIC #
	INSURER A : Lloyd's	524210
INSURED American Testing & Inspection Services, LLC ATIS Elevator Inspections, LLC CNY Elevator Inspections, LLC 600 Emerson Rd., Suite 225 Creve Coeur, MO 63141	INSURER B : Endurance American Insurance Company	10641
	INSURER C : National Liability & Fire Insurance	20052
	INSURER D : Admiral Insurance Company	24856
	INSURER E : The Hanover Insurance Company	22292
	INSURER F :	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC OTHER:			GLL-11026-00	12/10/2022	12/10/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 500,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$			EXEC30000224006	12/10/2022	12/10/2023	EACH OCCURRENCE \$ 9,000,000 AGGREGATE \$ 9,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y / N If yes, describe under DESCRIPTION OF OPERATIONS below		N / A	WC927858367204	12/10/2022	1/1/2024	PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
D	Professional Liabili			EO000031407	12/10/2022	12/10/2023	Per Claim & Aggregat \$ 5,000,000
E	Crime			BDK-D862898-01	12/10/2022	12/10/2024	Per Claim \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Primary Umbrella Above: Aggregate \$5,000,000

Excess Umbrella: Carrier Crum & Forster; Term: 12/10/22 to 12/10/23; Policy #SEO-121649; Aggregate, : \$4,000,000; Retention: \$0

Total Umbrella Limit: \$9,000,000

Primary Professional Above; Aggregate: \$3,000,000

Excess Professional Liability: Carrie Admiral Insurance; Term: 12/10/22 to 12/10/23; Policy #BO621PATIS000321; Aggregate/Claim \$2,000,000; Deductible \$0

Total Profesional Liability Limit: \$5,000,000

CERTIFICATE HOLDER

CANCELLATION

For Informational Purposes Only

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
12/06/2022

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Lockton Affinity, LLC P. O. Box 879610 Kansas City, MO 64187-9610	CONTACT NAME: Lockton Affinity	
	PHONE (A/C.NO Ext): 877-320-9393	FAX (A/C, No): 913-652-7599
	E-MAIL ADDRESS: EFM@locktonaffinity.com	
	INSURER(S) AFFORDING COVERAGE	
INSURED ATIS Elevator Inspections, LLC 2127 Innerbelt Business Center Dr, Ste 210 Saint Louis MO 63114	INSURER A: Old Republic Insurance Company	
	INSURER B:	
	INSURER C:	
	INSURER D:	
	INSURER E:	
	INSURER F:	

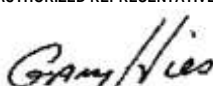
COVERAGES	CERTIFICATE NUMBER	REVISION NUMBER
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THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY						
	Claims Made Occur						EACH OCCURRENCE
							DAMAGE TO RENTED PREMISES (Ea occurrence)
							MED EXP (Any one person)
							PERSONAL & ADV INJURY
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE
	POLICY PROJEC LOC						PRODUCTS - COMP/OP AGG
	OTHER						
A	AUTOMOBILE LIABILITY	X	X	L452348-22	12/10/2022	12/10/2023	COMBINED SINGLE LIMIT (Ea accident)
	X ANY AUTO						BODILY INJURY (Per person)
	OWNED AUTOS ONLY						BODILY INJURY (Per accident)
	X HIRED AUTOS ONLY	X					PROPERTY DAMAGE (Per accident)
	UMBRELLA LIAB						EACH OCCURRENCE
	EXCESS LIAB						AGGREGATE
	D RETENTION \$						
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY Y/N						PER STATUTE OTH-ER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						E.L. EACH ACCIDENT
	If yes, describe under DESCRIPTION OF OPERATIONS below	N/A					E.L. DISEASE - EA EMPLOYEE
							E.L. DISEASE - POLICY LIMIT

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) GPBR: 1BL4

Policy provides protection for any and all operations/jobs performed by the named insured where required by written contract. Certificate holder is an Additional Insured where required by written contract. Waiver of Subrogation included by written contract. Insurance is primary and non-contributory.

CERTIFICATE HOLDER	CANCELLATION
PROOF OF COVERAGE	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

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**RFP 0452 Request for Proposal to Provide Vertical Transportation
Consultants (Vertical Consulting Service)**
Jefferson Parish Government

Project documents obtained from www.CentralBidding.com
18-Jan-2023 08:48:56 AM



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

December 15, 2022

ADDENDUM #1

RFP No.:0452

Receipt Date: January 26, 2023

For: TO PROVIDE VERTICAL TRANSPORTATION CONSULTANTS (ELEVATOR CONSULTING SERVICES)

CLARIFICATIONS:

See Attached Revised Section 1.10- Date has been added and Revised Signature Page- RFP number, Description and Receipt Date added

Please discard those two pages and replace with the Revised per Addendum 1 pages.

Sincerely,

DONNA EVANS

Donna M. Evans, Buyer II
Jefferson Parish Purchasing Department

RFP SUBMISSION:

Proposer must acknowledge all addenda on the signature page. Proposer acknowledges receipt of this addendum on the signature page by entering the number that has been assigned to this addendum

This addendum is a part of the contract documents and modifies the original RFP documents and specifications. The contents of this addendum shall be included in the contract documents. Changes made by this addendum shall take precedence over the documents of earlier date.

GENERAL GOVERNMENT BLDG. — 200 DERBIGNY ST., SUITE 4400, GRETN, LA 70053
OFFICE 504.364.2678

JOSEPH S. YENNI BLDG. — 1221 ELMWOOD PARK BLVD., SUITE 404, JEFFERSON, LA 70123
OFFICE 504.364.2678

EMAIL: PURCHASING@JEFFPARISH.NET WEBSITE: WWW.JEFFPARISH.NET

portion of the proposal submission and MUST NOT be included with the cost proposals and/or price schedules.

- H. Price Proposal: Proposer's fees and other costs shall be submitted **in a separate electronic envelope (named "Pricing Attachments")** with proposal submission. This price proposal shall include any and all costs the proposer wishes to have considered in the proposed contractual arrangement with the Parish of Jefferson. The price proposal shall be worth twenty-five percent (25%) of the total price points assigned. The maximum cost points shall be calculated by multiplying the number of cost points assigned to price in the evaluation criterion multiplied by the number of evaluators scoring the proposal. Evaluation of price proposal shall take place after technical evaluation has been completed.

1.8 Number of Response Copies

Each proposer shall submit one (1) original **electronic** signed proposal. PDF files are preferred. Price proposals ***shall not*** be included in the Technical portion of your submission.

1.9 Legibility/Clarity

Proposals submitted in response to the requirements of this RFP in the formats requested are desirable with all questions answered in as much detail as practicable. The proposal shall demonstrate an understanding of the requirements. Proposals shall be prepared simply and economically, providing straightforward, concise descriptions of the proposer's ability to meet the requirements of the RFP. Each proposer is solely responsible for the accuracy and completeness of its proposal.

1.10 Pre-proposal Conference

A pre-proposal conference will be held at **(10:00 AM on January 9, 2022 GGB 200 Derbigny St. Suite 4400 Gretna, La 70053)**. Prospective proposers may participate in the conference to obtain clarification of the requirements of the RFP and to receive answers to relevant questions thereto. Any proposer intending to submit a proposal is encouraged to attend and should have at least one authorized representative attend the Pre-proposal Conference.

Although impromptu questions will be permitted and spontaneous answers will be provided during the conference, the only official answer or position of the Parish of Jefferson will be stated in writing in response to written questions in the form of addenda provided to all prospective proposers.

1.11 Written Inquiries

Request for Proposals # RFP 0452

Project Description; Vehicle Transportation Consulting Firm that can Review Existing Service Contracts, Develop Deficiency Lists on Existing Equipment, Code Upgrades, Recalls, Operation and Maintenance Being Performed or not Being Performed. Perform Follow up Maintenance and Operation Audit Reviews.

SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing VERTICAL TRANSPORTATION CONSULTANTS / ELEVATOR CONSULTING SERVICES for the for the Jefferson Parish Department of General Services.

Request for Proposals will be received until 3:30 p.m. Local Time on: January 26 , 2023.

Acknowledge Receipt of Addenda: Number: 1
Number: _____
Number: _____
Number: _____
Number: _____
Number: _____

Name of Proposer: ATIS Elevator Inspections, LLC

Address: 600 Emerson Road, Suite 225, Creve Coeur, MO 63141

Phone Number: 314-926-1414 Fax Number _____

Type Name of Person Authorized to Sign: Joshua Convery

Title of Person Authorized to Sign: Business Development Specialist

Signature of Person Authorized to Sign: Joshua Convery

Email Address of Person Authorized to Sign: jconvery@atis.com

Date: 01/26/2023



CENTRALBIDDING
FROM CENTRAL AUCTION HOUSE

**RFP 0452 Request for Proposal to Provide Vertical Transportation
Consultants (Vertical Consulting Service)**
Jefferson Parish Government

Project documents obtained from www.CentralBidding.com
18-Jan-2023 08:48:58 AM



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

December 16, 2022

ADDENDUM #2

RFP No: 0452

Receipt Date: January 26, 2023

For: TO PROVIDE VERTICAL TRANSPORTATION CONSULTANTS (ELEVATOR CONSULTING SERVICES)

CLARIFICATIONS:

This is to Clarify Addendum 1

See Attached Revised Section 1.10-page 8 -Date has been added -January 9, 2023.

Revised Signature Page 26- RFP number 0452 has been added, Project Description: Vehicle Transportation Consulting Firm that can Review Existing Service Contracts, Develop Deficiency Lists on Existing Equipment, Code Upgrades, Recalls, Operation and Maintenance Being Performed or not Being Performed. Perform Follow-up Maintenance and Operation Audit Reviews. Receipt Date January 26, 2023 has been added

Please discard those two pages and replace with the Revised per Addendum 1 pages.

Sincerely,

Donna Evans

Donna M. Evans, Buyer II
Jefferson Parish Purchasing Department

RFP SUBMISSION:

Proposer must acknowledge all addenda on the signature page. Proposer acknowledges receipt of this addendum on the signature page by entering the number that has been assigned to this addendum

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OFFICE 504.364.2678

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OFFICE 504.364.2678

EMAIL: PURCHASING@JEFFPARISH.NET WEBSITE: WWW.JEFFPARISH.NET

portion of the proposal submission and **MUST NOT** be included with the cost proposals and/or price schedules.

- H. Price Proposal: Proposer's fees and other costs shall be submitted **in a separate electronic envelope (named "Pricing Attachments")** with proposal submission. This price proposal shall include any and all costs the proposer wishes to have considered in the proposed contractual arrangement with the Parish of Jefferson. The price proposal shall be worth twenty-five percent (25%) of the total price points assigned. The maximum cost points shall be calculated by multiplying the number of cost points assigned to price in the evaluation criterion multiplied by the number of evaluators scoring the proposal. Evaluation of price proposal shall take place after technical evaluation has been completed.

1.8 Number of Response Copies

Each proposer shall submit one (1) original **electronic** signed proposal. PDF files are preferred. Price proposals ***shall not*** be included in the Technical portion of your submission.

1.9 Legibility/Clarity

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1.10 Pre-proposal Conference

A pre-proposal conference will be held at **10:00 AM on January 9, 2023 General Government Building 200 Derbigny St. Suite 4400 Gretna, La 70053.** Prospective proposers may participate in the conference to obtain clarification of the requirements of the RFP and to receive answers to relevant questions thereto. Any proposer intending to submit a proposal is encouraged to attend and should have at least one authorized representative attend the Pre-proposal Conference.

Although impromptu questions will be permitted and spontaneous answers will be provided during the conference, the only official answer or position of the Parish of Jefferson will be stated in writing in response to written questions in the form of addenda provided to all prospective proposers.

1.11 Written Inquiries

Request for Proposals # RFP 0452

Vertical Transportation Consulting Firm that can Review Existing Service Contracts, Develop Deficiency Lists on Existing Equipment, Code Upgrades, Recalls, Operation and Maintenance Being Performed or not Being Performed. Perform Follow up Maintenance and Operation Audit Reviews.

SIGNATURE PAGE

The Jefferson Parish Department of Purchasing is soliciting Request for Proposals (RFP'S) from qualified proposers who are interested in providing VERTICAL TRANSPORTATION CONSULTANTS / ELEVATOR CONSULTING SERVICES for the for the Jefferson Parish Department of General Services.

Request for Proposals will be received until 3:30 p.m. Local Time on: January 26 , 2023.

Acknowledge Receipt of Addenda: Number: _____
Number: 2 _____
Number: _____
Number: _____
Number: _____
Number: _____

Name of Proposer: ATIS Elevator Inspections, LLC

Address: 600 Emerson Road, Suite 225, Creve Coeur, MO 63141

Phone Number: 314-926-1414 Fax Number _____

Type Name of Person Authorized to Sign: Joshua Convery

Title of Person Authorized to Sign: Business Development Specialist

Signature of Person Authorized to Sign: Joshua Convery

Email Address of Person Authorized to Sign: jconvery@atis.com

Date: 01/26/2023



CENTRALBIDDING
FROM CENTRAL AUCTION HOUSE

**RFP 0452 Request for Proposal to Provide Vertical Transportation
Consultants (Vertical Consulting Service)**
Jefferson Parish Government

Project documents obtained from www.CentralBidding.com
18-Jan-2023 08:48:59 AM



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

January 13, 2023

ADDENDUM #3

RFP No: 0452

Receipt Date: January 26, 2023

For: TO PROVIDE VERTICAL TRANSPORTATION CONSULTANTS (ELEVATOR CONSULTING SERVICES)

CLARIFICATIONS:

1. At section 1.4 of the RFP "Proposer Minimum Requirements", item b reads, "Maintain a fully staffed and equipped local consulting facility. Sub-contractors will not be permitted for this RFP". Can you help me with the definition of the word "local" in this instance? Louisiana office? Midwest office OK?
Item (b) from Section 1.4 can be removed from the RFB.
2. Will there be a listing providing number and type of vertical transportation units within Jefferson Parish for pricing purposes? It would be very difficult for pricing to be estimated without some idea of how many units and what type of units are to be surveyed and reported on.

This contract is on an "As Needed Basis"- overall Jefferson Parish has approximately 50 elevators.

Sincerely,

DONNA EVANS

Donna M. Evans, Buyer II
Jefferson Parish Purchasing Department

RFP SUBMISSION:

Proposer must acknowledge all addenda on the signature page. Proposer acknowledges receipt of this addendum on the signature page by entering the number that has been assigned to this addendum

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JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

This addendum is a part of the contract documents and modifies the original RFP documents and specifications. The contents of this addendum shall be included in the contract documents. Changes made by this addendum shall take precedence over the documents of earlier date.

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