

January 13, 2026  
4:30 p.m.  
City Hall  
80 Broad Street  
<https://www.youtube.com/@CityofCharlestonSCgov/streams>

## COMMITTEE ON WAYS AND MEANS

1. Invocation – Councilmember Gregg

2. Approval of Minutes:

December 16, 2025

3. Bids and Purchases

4. Budget, Finance, and Revenue Collections: Approval of an 8-year subscription fee in the amount of \$2,514,147.00 for the Workday Success Plan and the implementation of Accounting Center which will optimize the usage of Workday and enhance efficiencies. The amount represented above is the total cost over the 8-year period. The amount of subscription is \$284,000 in 2026 and \$318,595 for the remaining 7 years.

5. Facilities and Capital Projects – Parks: Approval to accept the National Recreation and Park Association's 2025 Show Your Park Some Love Recycling grant award in the amount of \$10,000.00 to add new recycling bins and programming at Brittlebank Park. There is no City match.

6. Police Department: After-the-fact approval to accept an award for the FY25 Ernest E. Kennedy Center AET grant totaling \$5,000. Funds will help combat underage drinking and drug use with ID software and field intelligence training. There is no match required for this grant.

7. Police Department: Approval to submit an application for the FY26 Ernest E. Kennedy Center AET grant totaling \$3,000. Funds will help combat underage drinking and drug use with ID software and field intelligence training. There is no match required for this grant.

8. Police Department: Approval to enter into a subaward agreement with Faces and Voices of Recovery (FAVOR) Lowcountry for services rendered as part of the Charleston Police Department's SCORF grant project. FAVOR Lowcountry will be reimbursed up to a total of \$93,150 for services using funds from CPD's Year 3 SCORF allotment.

9. **The Committee on Real Estate (Meeting was held on Monday, December 15, 2025, at 3:00 p.m.).**

a. Approval of a resolution supporting the submittal of an application by the Lowcountry Land Trust, in conjunction with the South Carolina Conservation Bank and National Coastal Wetland Conservation Grant Program, to the Charleston County Greenbelt Program to provide for the purchase of a bargain sale conservation easement on the Dill property for an amount up to

\$3,000,000.00, contingent on Charleston Museum and the City entering into a right-of-first refusal agreement should the museum sell all or any multiple portion(s) thereof in the future. (Dill Tract, James Island; TMS#'s 337-00-00-001 and 334-00-00-001) (**Previously approved at the Ways and Means and City Council meetings held on December 16, 2025.**)

b. Please consider the following annexations:

- (i). 1744 E. Avalon Circle (0.31 acre) (TMS# 352-13-00-083), West Ashley (District 9). The property is owned by Bryn Hite.
- (ii). 32 Rosedale Drive (0.34 acre) (TMS# 418-14-00-005), West Ashley (District 9). The property is owned by John & Mirella Mirabelli.
- (iii). 2206 Weepoolow Trail (0.30 acre) (TMS# 353-12-00-003), West Ashley (District 2). The property is owned by Robin L. and William A. Daisley.
- (iv). 1352 S. Edgewater Drive (0.58 acre) (TMS# 349-13-00-036), West Ashley (District 11). The property is owned by Edward and Ruth Baer.
- (v). 218 Island Drive (0.62 acre) (TMS# 349-14-00-028), West Ashley (District 11). The property is owned by Dale J. Aren and Scott Allan.
- (vi). 1598 Boone Hall Drive (0.34 acre) (TMS# 353-14-00-131), West Ashley (District 7). The property is owned by 1598 Boone Hall Trust.
- (vii). 2520 Liverpool Drive (0.28 acre) (TMS# 309-13-00-045), West Ashley (District 2). The property is owned by Christopher and Roxanna Troutman.

## COMMITTEE / COUNCIL AGENDA

<b>TO:</b>	William S. Cogswell, Jr., Mayor		
<b>FROM:</b>	Amy Wharton	<b>DEPARTMENT</b>	BFRC
<b>SUBJECT:</b>	JANITORIAL SERVICES FOR THE CITY MUNICIPAL OFFICE BUILDING		
<b>REQUEST:</b>	Establish a contract for Janitorial Services for the City Municipal Office Building with Elite Touch Cleaning Services, Inc., Charlotte, NC. Solicitation #25-P022R		
<b>COMMITTEE OF COUNCIL:</b>	Ways & Means	<b>DATE:</b>	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	<u>Signature of Individual Contacted</u>	Attachment
Corporate Counsel	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Section Chief	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Procurement Director	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Hayley O.</i>	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: Facilities Management Account #: Police Admin Services Professional & Contractual Services

Balance in Account \$180,000 Amount needed for this item \$180,000.00

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

CFO's Signature:

*Matthew, Deputy CFO for Amy Wharton, CFO*

**FISCAL IMPACT:** Funding is in the 2026 Budget

Mayor's Signature:

William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE: A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.**

# Janitorial Services for the City MOB

Solicitation# 25-P022R

Date: November 13, 2025

Buyer: Robin B. Robinson  
Procurement Director: Gary Cooper

Ranking of Proposals (#1 = highest score)	
Elite Touch Cleaning	602
American Facility Services	551
The Budd Group	533
Kleen Tech	525
GreenGuard Commercial Cleaning	507
SEJ Services	497
A&B Cleaning	486
Tidey Up Charleston	439
CMA Services	430
US&S	421
Integrity Contracting	406
Complete Cleaning	388
CFL Facilities	362
See All	355
Netta's Cleaning Services	326
AMC Cleaning	321
Contractors Enterprises	321
TC Services	314
Herald Office	213
Quality Touch Janitorial	180
Professional Clyde & Brandon	156

STATE OF SOUTH CAROLINA      )  
                                    )  
COUNTY OF CHARLESTON      )

**AGREEMENT BETWEEN THE CITY OF CHARLESTON  
AND ELITE TOUCH CLEANING SERVICES, INC. FOR  
JANITORIAL SERVICES FOR THE CITY MUNICIPAL OFFICE BUILDING**

THIS AGREEMENT is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_  
between the City of Charleston, a municipal corporation organized under the laws of the State of  
South Carolina (hereinafter referred to as "the City"), and Elite Touch Cleaning Services, Inc.  
(hereinafter referred to as the "Contractor").

NOW, THEREFORE, for and in consideration of the mutual promises, covenants and  
conditions stated herein, the parties agree as follows:

**§1.    SCOPE OF SERVICES**

The parties agree that the Contractor shall furnish the Janitorial Services for the City  
Municipal Office Building in accordance with Solicitation #25-P022R. All attachments  
and exhibits, including Exhibits A, B, C, and D listed below, shall be incorporated herein:

Exhibit A:      Solicitation #25-P022R (the "Request for Proposal")  
Exhibit B:      Addenda to Solicitation  
Exhibit C:      Insurance Requirements  
Exhibit D:      Contractor's Proposal & Cost Proposal

In the event of any conflict between the contract documents, the following order of  
control shall prevail: the Agreement between City and Contractor, Exhibit A, Exhibit B,  
Exhibit C, Exhibit D.

1. The Contractor shall safely, diligently and in a professional and timely manner  
perform, with its own equipment and assets, and provide goods and/or services as  
described in Exhibit A, B and D as approved by the City in fulfilling its obligations as  
set forth in this Agreement. Unless modified in writing by the parties hereto, the  
duties of the Contractor shall not be construed to exceed the provision of the goods  
and/or services pertaining to this Agreement.
2. The Contractor shall provide the services as set forth and described in Exhibit A, B  
and D as approved by the City to this Agreement and specifically detailed in any  
Purchase/Work Orders, if any, as may be issued from time-to-time by the City.
3. The Contractor hereby warrants and represents to the City that it possesses all  
necessary licenses to perform the work as set forth in this Agreement, carries the  
requisite insurance policies as set forth in Exhibit C, and is competent and able to  
provide professional and high quality goods and/or services to the City in accordance  
with this Agreement.

4. The Contractor shall bill only for work according to Exhibit A, B and D as approved by the City and the proposed pricing for such work as shown in Exhibit D. No additional work shall be performed unless requested by the City Official authorized for this project. If the City requests any additional work from the Contractor, the parties shall negotiate any possible additional costs related thereto prior to Contractor's performance of such requested additional work.

**§2. CONTRACT TERM**

The initial term of this Agreement shall be for a period of one (1) year from the date of execution. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

**§3. COMPENSATION AND PAYMENT TERMS**

This Agreement authorizes payments not to exceed \$180,000.00 (One Hundred Eighty Thousand Dollars and Zero Cents) per year to be made in accordance with the Request for Proposal, Addenda and the Contractor(s)' Proposal Response and Cost Proposal, Exhibits A, B and D. Payment terms shall be Net 30 days after receipt of an approved invoice by the City. Payment to the Contractor shall be made after services have been rendered. The Contractor must submit an original invoice for each payment request to the City in care of Accounts Payable whose mailing address is PO Box 853, Charleston, SC 29402, and whose physical office is located at 116 Meeting Street, Charleston, SC 29401. Faxed and/or copied invoices from the Contractor to the City shall not be accepted. Rates shall not increase during the term of this Agreement or any agreement extensions. If the Contractor requests a price increase, it shall be in accordance with the US Department of Labor/Bureau of Labor Statistics/Consumer Price Indexes, and shall only be requested ninety (90) days prior to the anniversary date of the Agreement. The City shall have the sole discretion to honor or reject the Contractor's request for a price increase.

**§4. WARRANTIES AND REPRESENTATIONS**

- A. The Contractor hereby represents and acknowledges that it is a licensed, bonded contractor capable of performing the work hereunder.
- B. All equipment, materials, and supplies incorporated in the work covered by this Agreement and provided by the Contractor are to be of the highest quality for their intended purpose. When requested, the Contractor shall furnish to the City for approval the name of the manufacturer, the model number, and other identifying data and information regarding the performance, capacity, nature and rating of the machinery, mechanical, and other equipment which the Contractor is required to incorporate into the project. Machinery, equipment, material and supplies used without the required prior approval of the City shall be at the risk of subsequent rejection by the City at no cost to the City.
- C. The Contractor warrants and represents that its staff is knowledgeable about, and experienced in providing the materials specified in the work required in accordance with this Agreement and warrants that it will use its best skill and attention to provide the above described work and materials in a professional and timely manner.

## **§5. SUBCONTRACTORS**

- A. If any Subcontractor shall be used for this project, the Contractor shall provide to the City's Director of Procurement a list of names of any of the intended Subcontractors, the Subcontractor's applicable license number(s), and a description of the work to be done by each subcontractor, if requested by the City.
- B. The Contractor shall not substitute any Subcontractor without the prior written consent of the City's Director of Procurement.
- C. The Contractor shall be responsible for all services performed by a Subcontractor. Responsibilities include, but are not limited to, compliance with any applicable licensing and insurance regulations.
- D. If at any time the City's Director of Procurement determines that any Subcontractor is incompetent or undesirable, he shall notify the Contractor accordingly, and the Contractor shall take immediate steps for the termination/cancellation of the Subcontractor from any further work on the project. In addition, the Contractor shall take the necessary steps to replace such terminated Subcontractor from work on the project with a Subcontractor who is acceptable to the City.
- E. Nothing contained in any contract resulting from this Agreement shall create any contractual relationship between any Subcontractor and the City of Charleston.

## **§6. INDEMNIFICATION**

The Contractor hereby expressly agrees to indemnify and hold the City harmless against any and all expenses and liabilities arising out of the performance or default of this Agreement as follows:

The Contractor expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or Subcontractors or any person, firm, or corporation directly or indirectly employed by the Contractor, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the City and its employees or by any member of the public, to indemnify and save the City and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs and expenses arising out of the performance or default of this Agreement. Such costs shall include defense, settlement, court costs and reasonable attorneys' fees incurred by the City and its employees. This promise by the Contractor to indemnify the City shall include bodily injuries or death occurring to the City's officers, officials, employees and any person directly or indirectly employed by the City, the City's employees, the employees of any other independent contractors including Subcontractors, or to any member of the public. When the City submits notice, Contractor shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this indemnity obligation. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

## **§7. INSURANCE REQUIREMENTS**

The Contractor shall comply with all insurance requirements which are set forth in Exhibit C.

## **§8. GRATUITIES AND KICKBACKS**

***Gratuities.*** It shall be unethical and a violation of this Agreement by the Contractor for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement of a contract or subcontract, or to any solicitation or bid therefore.

***Kickbacks.*** It shall be unethical and a violation of this Agreement by the Contractor for any payment, gratuity, or offer of employment to be made by or on behalf of a Subcontractor under a contract to the Contractor, or to hire any Subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

## **§9. TERMINATION**

***For Convenience:*** The City reserves the right to terminate the contract with the Contractor when it is in the best interest of the City, including, but not limited to non-appropriation of funds. If the contract is so terminated, the City shall provide the Contractor with a minimum of thirty (30) days written notice and shall compensate Contractor for all necessary and reasonable direct costs of performing the services actually accomplished as of the date of termination. No other costs shall be allowed for a termination for convenience. No damages shall be allowed for a termination for convenience.

***For Default:*** If the Contractor fails to comply with the terms of the contract the City shall notify the Contractor in writing of the specifics regarding such noncompliance. If the Contractor fails to begin to cure the noncompliance within five (5) days after the notice, the City may terminate the contract by written notice to the Contractor with a minimum of thirty (30) days thereafter and Contractor shall only be compensated for services actually completed prior to termination, contractor shall not be entitled to any costs or damages resulting from a termination under this section.

## **§10. ASSIGNMENT**

The Contractor shall not assign in whole or in part any part of this Agreement without the prior written consent of the City. The Contractor shall not assign any money due or to become due to it under this Agreement without the prior written consent of the City.

## **§11. NOTICES**

All notices required under this Agreement to the parties shall be deemed properly given when deposited in the United States mail, either by registered or certified mail (postage prepaid) to:

To:	To:
City of Charleston	Elite Touch Cleaning Services, Inc.
William S. Cogswell, Jr.	Mario Mendigana
Mayor	Owner/President
PO Box 304	7716 England St. #B
Charleston, SC 29402	Charlotte, NC 28273

With copies to:

City of Charleston  
Legal Department  
50 Broad Street  
Charleston, SC 29401

City of Charleston  
Procurement Division  
2 George Street, Suite 3600  
Charleston, SC 29401

## **§12. CHANGE ORDERS**

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in this Agreement. The City's Procurement Director shall make all change orders to this Agreement in writing. The City shall not be bound by any change in this Agreement unless approved in writing by the Procurement Director.

## **§13. ENTIRE AGREEMENT**

This document and its Exhibits constitute the entire Agreement between the parties and all previous negotiations leading thereto. This Agreement shall be modified only by a written agreement signed by the City and the Contractor.

## **§14. GOVERNING LAWS**

The laws of the State of South Carolina shall govern this Agreement. All litigation arising under this Agreement shall be litigated in the Circuit Court in the Ninth Judicial Circuit of Charleston County, South Carolina, in the Court of Common Pleas.

## **§15. LICENSE AND PERMITS**

The Contractor shall, without additional expense to the City, be responsible for obtaining all necessary licenses and permits required by the State of South Carolina, or the City of Charleston or any other authority having jurisdiction as necessary to fully perform its obligations pursuant to this Agreement. The Contractor shall provide a copy of its valid City of Charleston Business License to the City upon the execution of this Agreement.

## **§16. PUBLICITY RELEASES**

The Contractor agrees not to refer to the award of this Agreement in any commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by the City. The Contractor shall not have the right to include the City's name in its published list of customers without prior approval of the City. With regard to news releases, the Contractor shall only be permitted to use the name of

the City and the type and duration of this Agreement in any news releases provided the Contractor shall first have obtained the prior written approval of the City. The Contractor also agrees not to publish, or cite in any form, any comments or quotes from the City's employees unless it is a direct quote from the Public Information Officer of the City.

**§17. INDEPENDENT CONTRACTOR**

The Contractor is an independent contractor and shall not be deemed an employee of the City of Charleston for any purpose whatsoever. The Contractor acknowledges that it is the Contractor's duty to verify identity and eligibility of its employees and all subcontractors in accordance with IRCA ("Immigration Reform and Control Act") as amended. The Contractor further agrees to indemnify the City if the Contractor fails to comply with IRCA as amended.

**§18. SEVERABILITY**

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this Agreement is invalid and unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed and enforced as so limited.

**§19. WAIVER OF CONTRACTUAL RIGHTS**

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

**§20. COMPLIANCE WITH LEGAL REQUIREMENTS**

All applicable Federal, State and local laws, ordinances, and rules and regulations of any authorities (including but not limited to any laws, ordinances or regulations relating to the SC Department of Revenue or the SC Board of Contractors) shall be binding upon the Contractor during the term of this Agreement. The Contractor shall be responsible for compliance with any such law, ordinance, rule or regulation, and shall hold the City harmless and indemnify same in the event of non-compliance as set forth in this Agreement.

**§21. BACKGROUND CHECK**

The City reserves the right to conduct criminal background checks on individuals assigned to this project, including the Contractor, its employees, agents or Subcontractors.

**§22. SC STATE AND LOCAL TAX**

Except as otherwise provided, contract prices shall include all applicable state and local taxes.

If applicable, two percent (2%) income tax withholding shall be withheld from each and every payment pursuant to Section 12-9-310 of the South Carolina Code of Laws (1976, as amended) for certain out-of-state contractors, and such sums will be paid over to the South Carolina Department of Revenue and Taxation (the "SCDRT"). When and if the City receives an executed SCDRT form I-312, Nonresident Taxpayer Registration Affidavit – Income Tax Withholding, such withholding shall cease.

Contractor shall calculate that portion of this Agreement that is subject to the nine percent (9%) South Carolina sales and/or use tax, which amount shall be itemized and shown on all invoices, and shall be paid to the SCDRT by the Contractor. If the Contractor is a non-South Carolina company, the City shall withhold said amount from all invoices and remit payment to the SCDRT, unless the Contractor furnishes the City with a valid South Carolina Use Tax Registration Certificate Number. The total of all sales tax to become due and payable in connection with this Agreement is listed herein.

The Contractor shall indemnify and hold harmless the City for any loss, cost, or expense incurred by, levied upon or billed to the City as a result of the Contractor's failure to pay any tax of any type due in connection with this Agreement.

### **§23. NON-DISCRIMINATION**

The Contractor(s) shall not discriminate against any individuals based upon age, sex, race, disability, religion, or sexual orientation. The successful Offeror will take affirmative action in complying with all Federal and State requirements concerning fair employment and treatment of all employees, without regard or discrimination by reason of race, color, religion, sex, national origin, or physical handicap.

### **§24. RELEASE OF INFORMATION**

The City of Charleston adheres to the South Carolina Code Title 30, Chapter 4, "Freedom of Information Act," when releasing information upon receipt of a FOIA request. Contractor has a duty to clearly mark any information that is considered proprietary or a trade secret to be removed or redacted according to this statute. Failure to clearly mark proprietary or trade secret information waives any claims Contractor may make against the City regarding the release of information. The City makes best efforts to redact this type of sensitive information, but is under no obligation per SC Code Section 30-4-40(a). Further, the City may, but has no obligation, to inform the Contractor should a FOIA request be made related to the release of Contractor's information.

The City of Charleston adheres to the South Carolina Rules of Court regarding the release of information pursuant to the receipt of a subpoena. Upon receipt of the subpoena where Contractor's information may be responsive material, the City will make a best effort to timely notify Contractor. Contractor must promptly notify City should they intend to quash or prevent any of this information from being released. Failure to notify the City of this intent to quash or prevent the release of information within forty-eight (48) hours of being notified of the receipt of the subpoena waives any claims the Contractor may have against the City for the release of Contractor's information.

The City also follows the South Carolina Department of Archives History records retention schedule and Contractor acknowledges that their records may be maintained and destroyed in accordance with these policies and schedules.

IN WITNESS WHEREOF, the parties hereto, by their authorized representatives, have signed, sealed and delivered this Agreement at Charleston, South Carolina.

WITNESSES FOR THE CITY:

Date: \_\_\_\_\_

Name \_\_\_\_\_

Date: \_\_\_\_\_

AUTHORIZED FOR THE CITY:

William S. Cogswell, Jr.

Mayor

Date: \_\_\_\_\_

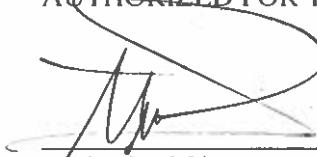
WITNESSES FOR VENDOR:

Marcela Marulanda

Name \_\_\_\_\_

Date: 12/17/25

AUTHORIZED FOR THE VENDOR:

 MARIO MENDICANA

Authorized Signer

Title PRESIDENT

Date: 12/17/25

Katerine Preza

Name \_\_\_\_\_

Date: 12/17/2025



## EXHIBIT A

The City of Charleston

Procurement Division

2 George Street, Suite 3600

Charleston, South Carolina 29401

P) 843-724-7312 F) 843-724-7354

[www.charleston-sc.gov](http://www.charleston-sc.gov)

**Proposal Number:** 25-P022R    **Proposals will be received until:** October 23, 2025 @ 12:30pm

**Proposal Title:** Janitorial Services for the City Municipal Office Building

**Non-Mandatory Pre-Proposal:** October 7, 2025 @ 9:00am – 2 George St. (near Security Guard station)

**Mailing Date:** September 26, 2025

**Direct Inquiries to:** Robin B. Robinson

**Vendor Name:**

**FEIN/SS#:**

**Vendor Address:**

**City – State – Zip:**

**Telephone Number:**

**Fax Number:**

**Authorized Signature:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. This signed page must be included with bid submission.

### **IMPORTANT**

1. This solicitation seeks proposals responding to the Scope of Work for a **Janitorial Services for the City Municipal Office Building**. This solicitation does not commit the City of Charleston to award a contract, to pay any costs incurred in the preparation of applications submitted, or to procure or contract for the services. The City reserves the right to accept or reject any, all or any part of any proposal received as a result of this Solicitation, or to cancel in part or in its entirety this Solicitation if it is in the best interest of the City to do so. The City shall be the sole judge as to whether proposals submitted meet all requirements contained in this solicitation.
2. Offeror may **mail, or hand-deliver** response to the Procurement Division. **Do Not Fax** in the proposal response. Please show the solicitation number on the outside of any mailing package. The City of Charleston assumes no responsibility for unmarked or improperly marked envelopes. If directing any other correspondence to the Procurement Division not related to the solicitation, please do not include the solicitation number on the envelope. If the Bidder chooses not to respond to this solicitation, it is recommended to return the "No Proposal Response Form" to our office.
3. **DEADLINE FOR SUBMISSION OF OFFER:** Any proposal or offer received after the Procurement Director or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the proposal opening.
4. Questions regarding this solicitation **must be submitted in writing to Robin B. Robinson no later than 1:00pm on October 8, 2025**. Questions may either be faxed to 843-724-7354 or emailed to **Robin B. Robinson, [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov)**.

## **GENERAL INFORMATION**

### **INTRODUCTION**

The City of Charleston is soliciting a Request for Proposal (RFP) for Janitorial Services at the City's Municipal Office Building (MOB), 2 George St. The awarded Contractor will furnish all labor, material, supplies (to include restroom supplies) and equipment needed to provide the required services as directed in the scope of work.

**There will be a Non-Mandatory Site Visit at 9:00am on Tuesday, October 7, 2025. Site Visit will begin near the Security Guards Desk, City Municipal Office Building, 2 George Street, Charleston, SC 29401 on the first floor.**

### **PROCUREMENT PROCESS**

The RFP (*Request for Proposal*) is not a bid. In the event the City elects to negotiate a contract with the successful Vendor, any contract shall contain, at a minimum, the term and conditions (or substantially the same term and conditions) as hereinafter stated. The City reserves the right, in its sole discretion, to reject all submissions, reissue a subsequent RFP, terminate, restructure or amend this procurement process at any time. The final selection and contract negotiation rests solely with the City.

### **QUESTIONS**

Every effort has been made to insure that all information needed by the Offeror is included herein; however, questions are allowed and encouraged to clear up any information as described herein, etc. The City will not accept telephone calls or visits regarding this RFP. **All questions shall be in writing and addressed to: Robin B. Robinson, City of Charleston, Procurement Division, 2 George Street, Suite 3600, Charleston, South Carolina 29401, or email to: [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov). Written Questions may also be faxed to 843-724-7354. All questions must be received before 1:00pm on October 8, 2025.** No interpretation shall be binding upon the City unless in writing from the City's Corporate Counsel.

### **ORAL STATEMENTS**

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. The City of Charleston shall not be legally bound by any amendment or interpretation that is not in writing.

### **NON-ENDORSEMENT**

If a Proposal is accepted, the successful Offeror shall not issue any news releases or other statements pertaining to the award or servicing of the agreement that state or imply the City's endorsement of the successful Offeror's product or services.

### **PROPRIETARY INFORMATION**

If an Offeror does not desire proprietary information in the Proposal to be disclosed, the Offeror shall identify all proprietary information in the Proposal. This identification will be done by individually marking each page with the words "Proprietary Information" or "Confidential" on which such proprietary information is found. If the Offeror fails to identify proprietary information, it agrees that by submission of its Proposal that those sections shall be deemed non-proprietary and made available upon request through the Freedom of Information Act.

### **UNAUTHORIZED COMMUNICATIONS**

Respondents' contact regarding this RFP with employees or officials of the City of Charleston will result in disqualification from this procurement process. Any oral communications are considered unofficial and non-binding with regard to this RFP. The only authorized contacts for this procurement are any designated Procurement staff.

### **CONTRACTOR SOLELY RESPONSIBLE FOR PERFORMANCE**

Vendor shall be responsible for the performance of the services required by the contract. Vendor is an independent contractor and does not act as the City's agent or employee.

### **DISQUALIFICATION OF OFFERORS**

Offerors may be disqualified for any of the following reasons:

- Reason to believe collusion exists among the Offerors
- The Offeror is involved in any litigation against the City
- The Offeror is in arrears on any existing contract or has defaulted on a previous contract with the City
- Lack of financial stability
- Failure to perform under previous or present contracts with the City
- Is currently debarred by the State of South Carolina Procurement Services

### **SUSPENSION AND DEBARMENT**

The Offeror certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal, state or local agency. Where the Offeror is unable to certify to any of the statements in this certification, such Offeror shall attach an explanation to this proposal.

### **CONTRACT NEGOTIATIONS**

The City will rank, based upon the evaluation criteria, all responsible and responsive Vendors. The City will begin negotiations with the top ranked Vendors and will continue with negotiation down the ranking until a satisfactory contract with the City is finalized, if any. The terms and conditions of the contract will be no less advantageous than the provisions of this RFP or the Vendor's proposal. The City reserves the right to make a partial award or to split the award at its sole discretion.

### **CONTRACT TERMS**

The initial term of the Agreement shall be for one year. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

### **VENDOR'S DUTY TO INSPECT & ADVISE AND DECLARE ALL COSTS**

Each Vendor shall become fully acquainted with the City's requirements and the scope of commodities and/or services to be provided. Vendor shall have a duty to request any information from the City as it deems necessary to prepare the RFP. No change order will be granted or additional compensation permitted if based upon information the Vendor knew or should have known as part of the Vendor's duty to become acquainted with the City's circumstances and requirements.

## **RECEIPT OF PROPOSALS**

Proposals must be submitted to and received by the City no later than the date and time specified within this RFP. Offerors mailing proposals should allow a sufficient mail delivery period to insure timely receipt (*October 23, 2025 @ 12:30pm*) of their proposal by the City. Proposals received after the scheduled due date and time will not be considered. Proposals must be completed and delivered in sufficient time to avoid disqualification for lateness due to difficulties in delivery. The time and date stamp clock in the City Procurement Division is the official clock for determining whether submittals are submitted on time. The City of Charleston is not responsible for delays in the delivery of mail by the U.S. Postal Service or private couriers. It is the responsibility solely of the Offerors to ensure that its proposal reaches the City of Charleston Procurement Division, by the designated date and time. Proposals received after the scheduled due date and time will not be considered.

**Late Proposal documents will not be accepted under any circumstances.**

## **PROPOSAL SUBMITTAL REQUIREMENTS**

To assure similarity in proposal presentation and allow the Selection Committee to easily compare competing proposals, Offerors shall include, in the order described, the material indicated below. It is not the intent of the City of Charleston to constrain Offerors with regard to content, but to assure that the specific requirements set for in this RFP are addressed in a uniform manner amenable to Evaluation and Selection Committee review. Offerors may include additional information sections or appendices if desired, to present additional pertinent information. Offerors should submit information in a concise and responsive manner for every requirement. Non-responsive or incomplete submittals or inability to meet City requirements set forth may lead to disqualification of the Offeror's submittal.

**Only information presented in the Proposal will be used to evaluate the submittals. Responses shall be completed in accordance with the requirements in the RFP. Statements made by an Offeror shall be without ambiguity, and with adequate elaboration, where necessary, for clear understanding.**

### **Specific Requirements**

Proposals should be as thorough and detailed as possible so that the City may properly evaluate the Offeror's capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

- Complete response to RFP, signed, completed and submitted as required with a detailed outline and description of proposed plan for staffing and cleaning as outlined in the RFP.
- Copies of all documents requested in this RFP as well as materials that may assist in the evaluation of this RFP.
- The submission of the detailed, itemized pricing.
- Sealed package marked on the outside with the Offeror's name, address, and the solicitation number.
- All submittal forms.

### **PROPOSAL FORMAT**

Proposals are to be prepared in a manner designed to provide the City with a straightforward presentation of the Offeror's capability to satisfy the requirements of this RFP. All copies shall be bound in a single volume (single sided only) and all documentation submitted with the proposal should be bound in that single volume, where practical.

All proposals should be clearly marked "**25-P022R – Janitorial Services for the City Municipal Office Building**"

All proposals must be submitted in a sealed envelope or box. All pricing information should be in a separate envelope clearly marked "Cost Proposal". Both sealed envelopes are to be placed in one package marked "**25-P022R – Janitorial Services for the City Municipal Office Building**" (*label provided*)

Proposals must be submitted by mail or hand delivered to Robin Barrett-Robinson, Senior Buyer, City of Charleston, Procurement Division, 2 George Street, Suite 3600, Charleston, SC 29401, ATTN: 25-P022R.

**Proposals must be received in the City's Procurement Office no later than 12:30pm on October 23, 2025. Late proposals will not be accepted.**

No more than one proposal may be submitted by any Vendor.

The proposal must be signed by an official authorized to contractually bind the Vendor.

All forms from this RFP requiring signature must be included in the proposal.

### **RESPONSE FORMAT AND ORGANIZATION**

To assure similarity in proposal presentation and allow the evaluation team to easily compare competing proposals, Offerors shall include, in the order described, the material indicated below. It is not the intent of the City to constrain Offerors with regard to content, but to assure that the specific requirements set forth in this RFP are addressed in a uniform manner amenable to Evaluation and Selection Committee review. Offerors may include additional sections or appendices if desired, to present additional pertinent information. Offerors should submit information in a concise and responsive manner for every requirement and every question. Non-responsive or incomplete answers to information requests and/or City requirements may lead to disqualification of the Offeror's submittal.

### **REQUIRED FORMS AND SIGNATURE PAGES**

Offerors shall include as an appendix, all ancillary forms required in this Request for Proposal (RFP). Required forms include, but are not limited to the following:

- RFP Cover Page
- Certificate of Familiarity
- Any Addenda

### **COMPLETION OF RESPONSES**

Only information presented in the Proposal will be used to evaluate the truck that best fits the needs of the City.

Responses shall be completed in accordance with the requirements of this RFP. Statements made by an Offeror shall be without ambiguity, and with adequate elaboration, where necessary, for clear understanding.

### **QUANTITY AND IDENTIFICATION OF PROPOSALS SUBMITTED**

Each vendor must submit the following:

- **One (1) original un-bound, single-sided Proposal labeled as “ORIGINAL”**
- **Five (5) bound, double-sided Proposals**
- **One (1) electronic copy on a flash drive. Please have submittal on a flash drive divided into two documents: 1) the proposal; and 2) the cost.**
- The Vendor must mark on the envelope or box containing the proposal the following information: **“25-P022R – Janitorial Services for the City Municipal Office Building”**
- Note the RFP identification number on the outside of the envelope or box
- All Proposals, including original, copies and the flash drive, shall be submitted together in one envelope or box
- Proposals must be submitted by mail or hand delivered to City of Charleston, Procurement Division, 2 George Street, Ste. 3600, Charleston, SC 29401, ATTN: 25-P022R

**No more than one proposal may be submitted by any Vendor.**

### **PROPOSAL EVALUATION PROCESS**

The City will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this request for competitive sealed proposal as defined in this section.

An Evaluation and Selection Committee will be established to evaluate the Proposals and select a proposal which represents the best value to the City. The Evaluation and Selection Committee will be comprised of City personnel and any other persons as designated by the City. This Committee will determine the responsiveness and acceptability of each proposal. The Evaluation and Selection Committee may request additional information from Offerors.

The City will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. Each Proposal received will first be analyzed to determine overall responsiveness and completeness to this RFP. Each Proposal will then be evaluated based on each of the criteria as outlined in Proposal Evaluation Criteria Factors, and after which identified as either reasonably qualified or unqualified. A Proposal will be declared unqualified if it clearly fails to demonstrate, in any of the listed areas, a standard that the City believes necessary to meet the requirements set forth in this RFP.

Following their review of all submitted Proposals, the Selection Committee may select a shortlist of the highest ranked reasonably-qualified Offerors. Shortlisted Offerors will be invited to present their Proposal to the Evaluation and Selection Committee.

The City may issue a request for clarification to the shortlisted firms requesting additional information or clarifications. This request may also invite each of the Offerors to give a formal presentation to the Evaluation and Selection Committee and outline the format of the presentation.

The purpose of the presentations will be to allow Offerors to further present their proposal and allow members of the Evaluation and Selection Committee to ask questions of the proposed project team.

#### **PROPOSAL EVALUATION CRITERIA FACTORS**

The following weighted criteria will be used to evaluate the Proposals for purposes of selecting the Offeror(s) to negotiate with or to shortlist.

##### **Criteria Factors**

- Ability to provide routine services per specifications
- Health & Safety Experience/Record
- Qualified Trained Staff
- Qualifications/Prior Experience (Work History)
- Company History/Financial Stability
- Provide information with whom you have similar experience
- Cost

It is the Offeror's responsibility to effectively communicate their qualifications, services, and products to the City by thoroughly responding to each requirement contained in this RFP.

## **Janitorial Services City Municipal Office Building (MOB) Scope of Work for 2 George Street**

The City of Charleston is soliciting a Request for Proposal (RFP) for Janitorial Services at the City Municipal Office Building. The awarded Contractor will furnish all labor, material, supplies (to include soap, paper products and can liners) and equipment needed to provide the required services. Janitorial Services will vary between daily, weekly, monthly and annually depending on the service required. Services will not only include routine custodial services but will also include special events as needed.

Services shall include cleaning of all offices, conference rooms, common areas, including lobbies, hallways, waiting areas, janitorial closets, elevators (where applicable) stairwells and landings (where applicable), restrooms, and restroom lobby areas.

There are approximately 150 employees in the Municipal Office Building.

### **Scope and Objectives**

It will be the sole responsibility of the Contractor to furnish the necessary labor, proper supervision, communication devices and cleaning equipment. Materials supplied by the Contractor shall conform to the specifications listed herein. Those not covered by specifications shall be of commercial grade and quality.

The Contractor will be responsible for standard cleaning necessitated by the normal operations of the facility and special cleaning required for events that are held in the facility.

### **Staffing Requirements**

The City requires 1 day porter and 1 working supervisor, Monday – Friday (8:00am – 4:00pm). The remaining staff (3 – 4 individuals) will service after hours (6:00pm – 10:00pm). We require 1 supervisor to oversee staff.

### **Work Hours**

All work will be performed after normal business hours Monday through Friday except for City holidays and unless otherwise disclosed.

### **Floor Maintenance**

- When and where furniture or equipment must be moved, no items are to be stacked on top of desks, tables, windowsills, credenzas, or any other furniture subject to damage from such.
- Upon completion of service, furniture, furnishing, and equipment shall be returned to original position. Baseboards, walls, stair-risers, furniture, furnishings, and equipment shall not be splashed, disfigured, or damaged during floor maintenance service.
- After sweeping and damp mopping/floor scrubbing, all floors shall be clean and free of streaks. No dirt shall be left in corners, under furniture, behind doors, or on stair landings or treads.
- Floors shall be properly prepared by thorough sweeping to remove visible dirt, debris, gum, tar, or similar substances. On completion of mopping and scrubbing, floors must be clean and free of dirt, water streaks, mop marks or string. Floors must be rinsed properly and dry mopped to overall clean appearance, with all surfaces dry, corners and cracks

clean. When scrubbing is required, it must be performed by the appropriate machinery or done by hand with a brush.

- Floors must be swept thoroughly and damp mopped or scrubbed as required, using a floor polishing machine with synthetic fiber pad and spray equipment containing the proper ratio of water and floor finish or other product recommended for this type of service. Pre-treat needed areas.

### **Floor Finishing**

- Floor finishing includes cleaning and applying finish to smooth finished concrete, rubber, vinyl, and linoleum, clay, and terrazzo floor surfaces.
- All floors shall be swept thoroughly; gum wads, tar, or other adhesive substances shall be removed.
- A concentrated liquid cleaner solution must be applied by mop and scrubbed with an electric polishing machine with scrub brush or medium grade scrubbing pad to remove all old finish or wax. Stubborn spots must be removed by hand with scouring pad dipped in solution. Corners and other areas the polishing machine cannot reach must be thoroughly cleaned by hand. Care must be exercised so baseboards, wall, and furniture are not splashed or marred. Solution must be removed with mop or water pick-up device and floor rinsed with clean water until all traces of solution are removed. The floor must be allowed to dry after rinsing.
- A number of coats of finish, to be determined by the Authorized Representative, must be applied with sufficient drying time between coats. The last coat must be applied up to, but not touching, baseboard, and other coats to within four inches of baseboard.
- In the case of a delay or more than eight hours between stripping and the final finish, or between coats and the final finish, floor must be cleaned again to remove surface dirt and scuff marks that may have occurred in the interim.

### **Carpets and Rugs**

- A vacuum cleaner with working beater bar must be used to clean carpet and rugs of visible debris and dirt. Where applicable, nap shall lie in one direction. Surface should appear clean of debris or dirt.
- Vacuuming must be done first in one direction and then the opposite direction. This process is to remove both soil and residue at base. Carpet or rug must have clean appearance when nap is pushed back to reveal base.
- A blend of a solvent and detergent solution must be used to effectively remove spots. A vacuum-type machine must be used to apply hot cleaning solution and immediately remove it from carpet or rug. Fibers must not be over-wetted and when solution is removed, should feel damp, but not wet. Rug or carpet fibers should have a clean, bright appearance.
- In all carpet and rug maintenance, care must be exercised to prevent damage or marring of furniture, furnishings, equipment, or trim by machinery or chemicals.

### **Restroom Floor Maintenance**

- Special attention must be given to floor areas around urinals and toilets to sanitize and eliminate odors, and removal of stains. When it is necessary to remove stains, floor will be scrubbed by hand utilizing a sanitizing, disinfectant cleaner. When completed, floor must have a clean appearance with no residue of cleaning material.

### **Walls and Surface Maintenance**

- Dust must be removed through the use of treated dust cloths or vacuum tools. When doing high cleaning, dust should not be allowed to fall onto furniture and/or equipment below. At completion of task, there must be no dust streaks. Corners, crevices, molding, trim and ledges must be free of dust. No oil spots or smudges must be left from dusting tools or cloths. When inspected, there must be few, if any, traces of dust on any surface.
- Clean, damp cloths or sponges must be used to remove all dirt, spots, streaks, or smudges from walls, glass, or other specified surfaces using a wetting solution with an appropriate cleaning agent. Surfaces must be dried or allowed to dry, as appropriate.
- If simple damp wiping and drying obtain a polished, bright appearance, damp wiping with a suitable cloth may perform bright metal polishing. Where damp wiping does not achieve bright and polished appearance, an appropriate metal polish must be applied and hand polished to a suitable luster.

### **Glass Cleaning (Interior Windows are 72")**

- Routine Cleaning: a glass cleaner must be sprayed on concentrated oil, grease, dirt, grime, and such spots must be removed by hand scrubbing. Entire surface must then be sprayed with cleaner and wiped or squeegeed dry to a uniform, clean appearance.
- Washing: a solution of water and a cleaning agent must be used to thoroughly clean windows. After each washing, all glass must be free of dirt, grime, streaks, excessive moisture, and not be cloudy. Glassware moved for cleaning must be returned to original position. Sashes, sills, woodwork and other surroundings must be wiped free of dust, drippings and watermarks.

### **Porcelain Ware Cleaning**

- Routine Fixture Cleaning: drinking fountains, washbasins, urinals, toilets, and other such fixtures made of porcelain or stainless steel must be damp wiped and an appropriate cleaning agent used when needed and polished dry to a clean, bright appearance. No excess moisture must remain on fixture.
- Thorough Fixture Cleaning: an appropriate cleaning agent must be used on all fixtures to remove all dust, spots, stains, rust, mold, and encrustation. After this process, fixtures must be damp wiped, dried to remove excess moisture, and left clean and bright.
- No spots, drippings, watermarks, cleaning solution marks, or residues are to be left on walls or floors adjacent to fixtures following cleaning.

### **Policing**

- Trash Pickup: all trash, including empty bottles and paper debris, must be picked up and placed in an appropriate container for conveyance for deposit in the proper trash receptacle or recycling container.
- Spillage Removal: beverage spills; cigarette and cigar butts, mud, tar or water tracks and similar stains or spillage on floor must be removed by the most appropriate method. Floor condition must be returned to match area surrounding spill.
- Routine Waste Basket Maintenance: contents of waste basket, including sanitary napkin receptacles and other disposals, must be emptied into appropriate large receptacle containing a lining of sufficient quality and strength to prevent leaking of liquids onto floor surfaces. Basket liners must be inspected, and if spoiled by deposit of any substance other than paper in basket or if torn, it must be discarded also and a new liner placed in basket.
- Thorough Waste Basket Maintenance: basket shall be emptied as required above, and then damp wiped with disinfectant and dried to a clean finish. New liner must be placed

in basket after thorough cleaning. No liner should be visible on the exterior of the receptacle. Unless otherwise instructed by the City Municipal Office Building (MOB) Authorized Representative all trash receptacles must remain in their designated "house position."

### **High Cleaning**

- Wall Maintenance: high cleaning of walls involves cleaning of area above 72" from the floor. Type of cleaning required must be appropriate to thorough cleaning of type of wall surface and condition of walls in high area.
- Following high cleaning, walls, trim and wall mounted fixtures must be free of dust, cobwebs, grime, smudges and spots. Where dusting is involved, dust must not be allowed to fall from high areas onto surfaces below. Personnel performing high cleaning must observe all applicable safety rules and regulations.
- Routine Light Fixture and Vent Cleaning: ceiling mounted light fixtures and heating, ventilation and air conditioning diffusers and vents must be dusted to remove accumulated dust and grime.
- Thorough Light Fixture and Vent Cleaning: ceiling mounted light fixtures and heating, ventilation and air conditioning diffusers and vents must be dusted and then damp wiped. All dirt, spots, streaks, smudges, oil, and residues must be removed. Upon completion, fixture or vent must have clean appearance.
- Routine Office Partitions and Screen Cleaning: upper edges of all office partitions and screens used for "open office" type arrangements must be dusted and accumulated dirt and grime removed.
- Thorough Office Partitions and Screen Cleaning: upper edges of all office partitions and screens used for "open office" type arrangements must be dusted, damp wiped with an appropriate cleaning agent and dried.

### **Scheduled Frequencies – Daily Typical Requirements**

**General Instructions:** unless otherwise specified by City Municipal Office Building (MOB), all services listed under Daily Requirements must be performed in applicable areas, except where service of a less frequent nature that provides a more thorough cleaning is to be performed.

- **Restrooms:** sweep and damp mop floor with a disinfectant type cleaner. Vacuum carpet if applicable. Damp wipe all commodes, urinals, washbasins, waste receptacles, dispensers, wall surfaces and chromed pipes with a disinfectant type cleaner. Spot clean, damp wipe and/or dust other surfaces within reach, including walls, moldings, ledges, frames, etc. Perform routine cleaning of all glass and mirrors. Empty, clean, and disinfect all trash cans, sanitary napkin receptacles, and other disposals; replace soiled bags with new ones, collect soiled bags in separate containers for disposal with flammable trash. Contractor to replenish stock, bags, etc. Refill all dispensers to normal limits, including napkins, soap, tissue, towels, liners and covers.
- **Accessible Spaces:** (includes lobby spaces, offices, copy or conference rooms, kitchens, break room and adjacent internal corridors) empty wastebaskets and remove trash and recyclables to designated disposal area. Clean washbasins and mirrors, where applicable. Perform dusting and damp wiping, as indicated, for wall and surfaces maintenance, including dusting of horizontal surfaces. Perform routine vacuuming of carpets and rugs in doorways and high-traffic areas, and perform dust mop of all hard surface floors. Perform routine cleaning of glass walls or internal windows in high traffic areas. Perform damp wiping, with a disinfectant cleaner, all telephone mouth and earpieces.

- **Elevators (City Side):** wipe and clean glass and stainless components. Police elevators daily to remove trash, paper, dust and debris from the escalators. Polish bright metal surfaces in interior of car. Metal polish must be applied and hand polished to provide a suitable luster on all brass surfaces. Vacuum elevator tracks.
- **Outside Entrances (2 George Street):** police and sweep entrances, landings, steps, and adjacent sidewalk area. When applicable, perform routine cleaning of exterior side of entrance door glass and glass area surrounding entrance. Polish all brass to a high shine on both porticos.

#### **Scheduled Frequencies – Weekly Typical Requirements**

**General Instructions:** department must approve the schedule for performance of once per week tasks. Unless department otherwise specifies, all tasks required under Daily Requirements must still be performed, except where the nature of such daily task is replaced under this weekly schedule or a less frequent schedule by a more thorough cleaning task for the same purpose.

- **Restroom:** perform high cleaning on all walls and surfaces with a disinfectant type cleaner.
- **Accessible Areas:** perform damp wiping on all wall and horizontal surface areas within reach. Dust blinds. In breakroom, clean inside and outside of microwaves; clean top of refrigerator, and damp clean/dry countertops and under microwaves. Perform thorough vacuuming of all carpet and rug floors. Wet mop and scrub all resilient floors.

#### **Scheduled Frequencies – Monthly Typical Requirements**

**General Instructions:** department must approve the schedule for performance of once per month tasks. Unless department otherwise specifies, all tasks required under Daily or Weekly Requirements must still be performed, except where the nature of such daily or weekly task is replaced under this monthly schedule or a less frequent schedule by a more thorough cleaning task for the same purpose.

- **Restroom:** perform thorough fixture cleaning as described in the Minimum Cleaning Quality Requirement for Porcelain Ware. Perform light fixture and vent cleaning as described in High Cleaning minimum requirements.
- **Accessible Areas:** perform high cleaning on all wall and horizontal surface areas. Dust all vertical surfaces and under surfaces, such as desk knee wells, chair rungs, table legs, lampshades. Perform periodic spray buffing on all resilient floors. Perform routine light fixture and vent cleaning. Perform routine office partition and screen cleaning. Spot clean all carpet and rug areas. Bonnet or extraction clean all spots.
- **Corridors:** perform high cleaning on walls. Perform glass washing on full glass areas of entrance doors, glass surrounding entrance doors, and glass areas leading off corridors.
- **Corridors, staircases and stairwells:** police area. Wet mop and scrub hard floors; damp mop and spray buff resilient floors.

#### **Scheduled Frequencies – Quarterly Typical Requirements**

**General Instructions:** Department must approve the schedule for performance on quarterly tasks. Unless Department otherwise specifies, all tasks required under daily, weekly, or monthly requirements must still be performed, except where the nature of such daily, weekly, or monthly tasks are replaced under this quarterly schedule or a less frequent schedule by more thorough cleaning tasks for the same purpose.

- **Restrooms:** damp wipe entire surface area of stall partitions, door frames, and sills with a disinfectant type cleaner. Wash all waste receptacles with disinfectant. Flush floor drains with deodorizing disinfectant.
- **Accessible Areas:** perform thorough light fixture and vent cleaning. Perform thorough office partition and screen cleaning. Perform thorough wastebasket maintenance.
- **Corridors:** sweep, strip, and finish resilient floors in high-traffic areas. Perform bright metal polishing on metal door thresholds.

#### **Scheduled Frequencies – Semi-Annual Typical Requirements**

**General Instructions:** Department must approve the schedule for performance of semi-annual tasks. Unless Department otherwise specifies, all tasks required under daily, weekly, monthly, or quarterly requirements must be performed, except the nature of such daily, weekly, monthly, or quarterly tasks replaced under this semi-annual schedule by a more thorough cleaning task for the same purpose.

- **All Areas:** cornice boards and blinds cleaning. Sweep, strip, and finish all resilient floors using a solvent paste wax, clean and buff wood floors. Perform bonnet clean or dirt extraction on all carpet and rug areas.

#### **Miscellaneous Requirements**

- Some areas will require twice-a-day cleaning. Such areas are to be mutually agreed upon by Contractor and City of Charleston.
- Appropriate finishing must be performed on all floors during the first sixty days of contract commencement, and on a schedule approved by department.
- In instances where restrooms are cleaned during hours in which building occupants are present, male restrooms must be cleaned by males and female restrooms cleaned by females.
- The Contractor's personnel shall report to the City Municipal Office Building (MOB) Authorized Representative, through Contractor's representative, any hazardous conditions or items in need of repair observed during work. The Contractor's personnel shall turn off lights when not use, unless otherwise instructed.
- The Contractor's personnel will lock all rooms after cleaning and return keys to Contractor's representative, unless otherwise instructed. The Contractor's personnel shall turn into Security, through Contractor's representative, any articles found in the building. Contractor's personnel shall report to Security, through Contractor's representative, any suspicious circumstances observed during performance of work, which appears to threaten the security of the building.
- The Contractor's personnel shall report to Security, through Contractor's representative, immediately upon the discovery of the loss of any keys to building areas.
- The Contractor's personnel shall maintain janitor closet in a neat and orderly fashion, and will clean, inspect and properly maintain all equipment. Contractor's personnel shall notify the City Municipal Office Building (MOB) Authorized Representative of any irregularities or equipment malfunctions.

#### **Monitoring**

- The City Municipal Office Building (MOB) shall furnish the Contractor floor plans of the facility with a designation of areas to be cleaned.
- The Contractor may be required to review various monitoring reports with Security, or others assigned to perform monitoring for Security in order to resolve cleaning problems in the facility.

### **Disposal**

Debris, rubbish, non-hazardous waste and non-usable material resulting from the work under the contract, shall be disposed of by the Contractor at his/her expense off of the City's property. There is a dumpster on-site for disposal of packaging and waste associated with material and supplies consumed by the City.

Recyclables resulting from the work under the contract shall be disposed of properly.

### **Safety Requirements and Reports**

All work shall be conducted in a safe manner. The City will not provide safety equipment to the Contractor.

The Contractor shall submit to the Department a full report of damage to City property and/or equipment by the Contractor employees. All damage reports shall be submitted to the Contracts Coordinator in the Procurement Division at 2 George St., Ste. 3600 within 24 hours of occurrence.

### **Security Requirements**

The Contractor shall comply with all facility security requirements. Upon request, the Contractor shall submit the name and address of each employee hired for work on this contract and shall cause to be filled out questionnaires and other forms as may be required for security.

Neither the Contractor nor any of its employees shall disclose or cause to disseminate any information concerning the operations of the facility which could result in or increase the likelihood of the possibility of a breach of the facility's security or interrupt the continuity of its operations.

### **Contractor Employee Identification**

All employees shall have proper identification. This will enable them to be identified as employees of the Contractor.

The Contractor shall furnish sufficient personnel to perform all work specified within the contract.

### **Staffing and Training**

1. All janitorial services personnel must adhere to the strict uniform and appearance guidelines set forth by the City of Charleston.
2. Janitorial services personnel assigned to the City Municipal Office Building must be able to read, understand and follow the specific orders for the City of Charleston. They must be able to communicate effectively both orally and in writing.
3. Janitorial services personnel must remain alert and pay attention to their surroundings. In addition to their normal responsibilities, they should report safety hazards or conditions requiring repairs to the City Authorized Representative and the Contract Coordinator in the Procurement Office.
4. All janitorial services personnel must meet the following requirements:
  - a. 20 years of age or older;
  - b. High school graduate or must have obtained a Graduate Equivalency Diploma;

- c. Able to speak, understand, read and write the English language sufficiently to complete reports stating facts in a clear and concise manner;
- d. Not have been convicted in any jurisdiction of any felony unless a full pardon has been granted per State licensing requirements;
- e. Not have been convicted in any jurisdiction of a Class A misdemeanor during the last five (5) years;
- f. Not have any pending, unresolved, or un-adjudicated felony or Class A misdemeanor charges or indictments in this or any other jurisdiction. Not be on probation or parole for any felony or Class A misdemeanor;
- g. Not be required to register in this or any other state as a sex offender;
- h. Have no outstanding warrants;
- i. Not have been declared by any court of competent jurisdiction incompetent by reason of mental defect or disease without having been restored;
- j. Not be suffering from intoxication, alcohol dependency, or from narcotics addiction or dependence. Prior to employment, all janitorial services personnel hired shall be drug tested at Contractor's expense. Subsequent drug testing, whether at random or for reasonable suspicion, shall also be conducted at Contractor's expense. Any janitorial services personnel or applicant testing positive for drugs shall be dismissed and shall not be permitted to work at the City of Charleston Municipal Office Building;
- k. Not have been discharged from the armed services of the United States under other than honorable conditions;
- l. Must be able to physically perform the specific requirements of the position to which they are assigned;
- m. Trained to perform duties in a work environment the size of the City of Charleston Municipal Office Building;
- n. Maintain a neat and well-groomed appearance at all times in accordance with Contractor's uniform and grooming policy, which is subject to Director's approval;
- o. Have ability to exercise good judgment; and, have ability to maintain a high level of performance

#### **Background Check**

The City of Charleston reserves the right to conduct criminal background checks on individuals assigned to this project to the maximum extent allowed by law.

#### **Contractor Quality Control (Compliance)**

The Contractor shall establish and maintain a Quality Control Plan (QCP) to ensure that the work performed under the contract conforms to the contract requirements. The Contractor shall submit to the Contracts Coordinator, a Quality Control Plan for approval within fifteen (15) calendar days after award of the contract.

The Contractor's QCP shall provide top contract management with an effective and efficient means of identifying and correcting problems throughout the entire scope of operations.

The QCP shall include:

- A description of the Contractor's quality control system. The system must cover all contract services, specify work to be inspected on either a schedule or unscheduled basis and describe how inspections are to be conducted

- The name(s) and qualifications of the individual(s) responsible for performing the quality control inspections and the extent of their responsibility
- Provisions for recording the results of inspections and for recording corrective action taken
- Provisions to update and revise the QCP during the performance of the contract

A file of all quality control inspections both performed and scheduled inspection results; dates and details of corrective actions taken shall be maintained by the Contractor through the term of the Contract. The file shall be the property of the City of Charleston and made available to the Contracts Coordinator during regular working hours. The file shall be turned over to the Contracts Coordinator within fifteen (15) days of completion/termination of the contract.

#### **Consequences of Contractor's Failure to Perform Required Service**

The Contractor shall perform all of the contract requirements. The City will apply surveillance method mentioned below and will withhold payment for unsatisfactory or non-performed work. The City reserves the right to change surveillance methods at any time during the contract without notice to the Contractor.

- Random Sampling Method – The City may apply a random method to any contract requirement to determine Contractor compliance.
- Other Surveillance Methods – The City may apply other surveillance methods to determine Contractor compliance. These include, but are not limited to, 100% inspection, and planned inspections as primary surveillance methods; and incidental inspections and validated customer complaints as supplemental surveillance methods.

Each phase of the work to be completed by the Contractor as a part of the contract is subject to inspection by the Contracts Coordinator or designee. All findings of unsatisfactory or non-performed work will be administered in accordance with the requirements of the contract.

The City will give the Contractor written notice of observed deficiencies for unsatisfactory or non-performed work and/or assessing liquidated damages. Such written notice shall not be a prerequisite for withholding payment for non-performed work. The City may specify, as provided for below, that liquidated damages can be assessed against the Contractor. Such liquidated damages are to compensate the City for administrative costs and other expenses resulting from the unsatisfactory or non-performed work.

The City will allow the Contractor an opportunity to re-perform the unsatisfactory or non-performed work, at no additional cost to the City. In case of daily work, corrective action must be completed within eight (8) hours of notice to the Contractor. In addition, the City can assess liquidated damages, as referenced above, in the amount of ten percent (10%) of the value of all observed defects. The original inspection results of the Contractor's work will not be modified upon re-inspection. However, the contractor will be paid for satisfactorily re-performed work.

The City will deduct from the Contractor's invoice all amounts associated with the unsatisfactory or non-performed work until the Contractor satisfactorily re-performs and completes the work.

If the City chooses to perform the work with City personnel or by other means, this amount will be deducted from the Contractor's invoice.

The Contractor is responsible for maintaining an effective Quality Control Plan during the course of the contract. Failure to maintain adequate control may result in termination for default.

Re-performance by the Contractor does not waive the City's right to terminate for non-performance. The City may terminate the contract, or any part hereof, for cause in the event of any default by the Contractor, or if the Contractor fails to comply with any contract terms and conditions, or fails to provide the City, upon request, with adequate assurances of future performance.

#### **Contractor Furnished Materials**

Materials supplied by the Contractor shall conform to the latest edition of the applicable specifications listed herein. Those not covered by specifications shall be of commercial grade and quality. The City is striving to be environmentally conscious. It is because of this that all cleaners should be environmentally friendly.

Toilet Supplies to be furnished by the Contractor shall conform to the requirements specified below.

Soaps for the restrooms shall conform to the following requirements.

Liquid soap for dispenser use shall be mildly scented, approximately 15% concentrate.

Paper Products shall conform to the following requirements.

Paper towels shall match and be of type to fit the existing paper towel dispensers.

Paper towels shall be of commercial grade, highly absorbent, wet strength type.

Toilet Tissue shall conform to the following requirements.

Toilet tissue shall be medium-soft.

Toilet tissue shall match and be of type to fit the existing toilet tissue dispensers.

Floor Products to be furnished by the Contractor shall conform to the requirements specified below.

Floor Cleaner shall conform to the following requirements.

Floor cleaner shall be mildly scented, medium-duty strength that will not strip wax from floors.

Floor Stripper shall conform to the following requirements.

Due to the diversity of floor types, floor stripper shall be the product recommended by the floor manufacturer for each type/make of flooring.

Floor Wax shall conform to the following requirements.

Floor wax for wood, terrazzo, ceramic, marble, and vinyl tile shall be general purpose that buffs to a bright satin luster.

Carpet Cleaning shall conform to the following requirements.

Carpets shall be vacuumed and spot cleaned only.

General Purpose Cleaner shall be an alkaline liquid detergent.

Cleaner Disinfectant Germicidal shall be general use janitorial disinfectant.

## Glass Cleaner

Waste Can Liner shall be of proper size to fit the containers.

#### Urinal Cakes to be supplied and placed in urinals

### Invoicing Instructions

Contractor's invoices shall be submitted to the City's Accounts Payable Office in monthly intervals for services performed. Payment will be based on invoices submitted by the Contractor for satisfactorily completed work. Upon verification of work actually performed and receipt of a proper invoice and any required Contractor submittals, invoices will be processed for payment. The invoice must include the following information:

- a) Name and Address of Contractor
- b) Invoice Date
- c) Contract Number and Purchase Order Number
- d) Description, quantity, unit of measure, unit price and extended price of supplies delivered or services performed.
- e) Payment terms and/or prompt payment discount terms.
- f) Name and address of Contractor official to whom payment is to be sent (must be the same as that of the Contractor on a proper notice of assignment).
- g) Name (where practicable), title, phone number and mailing address of person to be notified in the event of an improper invoice.
- h) Any other information or documentation required by the contract.

SQUARE FOOTAGES		MOB
EXTERIOR - COVERED		1,980 SF
MUNICIPAL OFFICES		26,119 SF
MUNICIPAL OFFICES - LOADING DOCK		1,957 SF
<b>GROUND LEVEL TOTAL SF</b>		<b>30,056 SF</b>
EXTERIOR - COVERED		1,616 SF
MUNICIPAL OFFICES		36,355 SF
<b>2<sup>ND</sup> FLOOR MAIN LEVEL</b>	<b>TOTAL SF</b>	<b>37,921 SF</b>
MUNICIPAL OFFICES		28,876 SF
<b>3<sup>rd</sup> FLOOR BOX TIER LEVEL</b>	<b>TOTAL SF</b>	<b>28,876 SF</b>
<b>Square Footage Grand Total</b>		<b>96,903 SF</b>

**ATTACHMENT A**  
**Floor Plans**

**Gaillard City Municipal Office Building**

**2 George Street**

**Charleston, SC 29401**

**96,903 Square Feet**

**(To be cleaned 5 days per week-as schedule dictates)**

**Monday – Friday**

Service	Daily	Weekly	Monthly	Annually
<b>Offices &amp; General Area – to include Lobby, etc.</b>				
Empty Waste Cans maintaining Unsoiled Liners	X			
Damp Wipe coffee rings, etc. from furniture (as needed)	X			
Dust exposed areas of furniture		X		
Clean and sanitize drinking fountains	X			
Low dust baseboards, chair rung, table legs, etc.		X		
High dust surfaces over 72" from the floor			X	
Spot clean walls so not to disturb finish (as needed)	X			
Spot clean lobby glass including front doors & partition glass	X			
Clean entire glass doors inside and out		X		
Dust Blinds		X		
Remove dust and cobwebs from ceiling			X	
Dust Mop hard floors or vacuum carpet door traffic areas only	X			
Dust Mop hard floors or vacuum carpet wall to wall		X		
Spot clean carpets (up to 2' diameter) & furniture (as needed)	X			
Spot clean furniture (as needed)		X		
Spot clean counter and sink in office areas, restock paper towels	X			
<b>Floors Hard Surfaces</b>				
Completely strip and refinish				X
Scrub and Recoat			X	
Buff			X	
Machine scrub restroom floors			X	
Lobby maintenance as specified			X	
<b>Windows</b>				
Clean exterior office windows				
Clean interior office windows			X	
<b>Restrooms</b>				
Clean, disinfect & polish all fixtures including toilet bowls, urinals, sinks	X			
Clean and polish mirrors	X			
Empty all trash cans and disposals, insert liners as needed, spot clean and sanitize container (inside & outside)	X			
Spot clean walls, doors & partitions	X			
Refill dispensers to normal limits – napkins, soap, tissue, towels, liners and covers	X			
<b>Supplies to be furnished by: Vendor</b>				
Low dust (36") – window sills, moldings, ledges, shelves, frames, etc.		X		
Dust all air ducts		X		
High dust (to 72") shelves, moldings, ledges, etc.			X	

Sweep and damp mop hard floors	X		
Vacuum carpet (if applicable)	X		
Flush floor drains with deodorizing disinfectant		X	
<b>General</b>			
Maintain janitor closet in neat and orderly fashion	X		
Clean and inspect equipment	X		
Observe building security and lighting procedures			
Notify building contact of any irregularities or equipment malfunctions	X		
Monitor and respond to Communication Log Book			
<b>Break Rooms – Kitchen Cafeteria</b>			
Damp clean and sanitize table tops, seats and back of chairs	X		
Damp clean pedestals and legs		X	
Clean and sanitize sinks, if free from dishes	X		
Empty waste receptacles replacing liner	X		
Clean and sanitize drinking fountains	X		
Spot clean doors, frames, light switches, kick plates and interior glass	X		
Low dust (36") and high dust (to 72") all horizontal areas		X	X
Clean entire interior glass in partitions and doors	X		
Dust mop hard floors	X		
Damp mop hard surface floors	X		
Vacuum carpeted areas	X		
Refill all dispensers	X		
Clean microwaves on outside	X		
Clean top of refrigerators		X	
Damp clean and dry countertops and under microwaves		X	
<b>Miscellaneous</b>			
Police stairwells; correct deficiencies	X		
Completely sweep or vacuum & mop stairwells		X	
Completely clean walls, doors, floors, and call buttons of elevator	X		
Vacuum elevator tracks		X	
Polish elevator tracks			X
<b>Other</b>			
Lobby Area	X		

Light cleaning of public restrooms and maintaining full stock of disposable supplies (soap, toilet paper, etc.)	On an as-needed basis
Policing of Track Pickup	On an as-needed basis
Policing of Spillage Removal	On an as-needed basis
Routing Waste Basket Maintenance	On an as-needed basis

**#25-P022R Janitorial Services City MOB, 2 George St.**

**Company Name** \_\_\_\_\_

**Business Information**

Date Business Established \_\_\_\_\_

**Check one:**

Proprietorship \_\_\_\_\_

Partnership \_\_\_\_\_

Corporation \_\_\_\_\_

**Total Business Income (from Janitorial Services)**

Fiscal Year to Date \$ \_\_\_\_\_

Fiscal Year Began \_\_\_\_\_

Last Fiscal Year \$ \_\_\_\_\_

Fiscal Year Began \_\_\_\_\_

**NOTE:** The Successful Bidder should be prepared to furnish a complete Financial Statement within five (5) days after notification of award, if requested.

The Successful Bidder should also be prepared to provide their Certificate of Insurance within five (5) days after notification of award.

**#25-P022R**

**Vendor:** \_\_\_\_\_

**Janitorial Services City Municipal Office Building (MOB)**

<b>Quantity</b>	<b>Description</b>	<b>Unit Price</b>	<b>Total Price</b>
1 each	Initial Cleaning for 2 George St.		
12 Months	Monthly Cleaning for 2 George St.		
1 each	Initial Cleaning for Police Sub-Station Team 2, 2 George St.		
12 months	Monthly Cleaning for Police Sub-Station Team 2, 2 George St. Three (3) days per week cleaning		
	Grand Total		
	<p>The estimated square footage of the City Municipal Office Building (2 George Street) is 96,903 square feet.</p> <p><i>Please keep in mind this is an estimate.</i></p> <p><i>The City reserves the right to add and delete locations as needed. The City also reserves the right to award in lots if it is in the best interest of the City.</i></p> <p><i>The initial term of the Agreement shall be for one year. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.</i></p>		

**Proposal Number:** 25-P022R    **Proposals will be received until:** October 23, 2025 @ 12:30pm

**Proposal Title:** Janitorial Services for the City Municipal Office Building

**Non-Mandatory Pre-Proposal:** October 7, 2025 @ 9:00am –2 George St. (near Security Guard station)

**Mailing Date:** September 26, 2025

**Direct Inquiries to:** Robin B. Robinson

### **CERTIFICATE OF FAMILIARITY**

The undersigned, having fully familiarized himself with the information contained within this entire solicitation and applicable amendments, submits the attached proposal, and other applicable information to the City, which I verify to be true and correct to the best of my knowledge. I further certify that this proposal response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, equipment or services in all respects, fair and without collusion or fraud. I agree to proposal by all conditions of this solicitation and certify that I am authorized to sign this proposal. I further certify all prices submitted shall remain effective for a minimum period of ninety (90) days, unless otherwise stated.

Company Name  
As registered with the IRS

Authorized Signature

Correspondence Address

Printed Name

City, State, Zip

Title

Email

Telephone Number/Toll Free Also (If Available)

Remittance Address

Fax Number

City, State, Zip

Date

Federal Tax ID (FEIN)/SS Number

SC Sales Tax Number

## **NO PROPOSAL RESPONSE FORM**

<b>Proposal Number:</b> 25-P022R	<b>Proposals will be received until:</b> October 23, 2025 @ 12:30pm
<b>Proposal Title:</b> Janitorial Services for the City Municipal Office Building	
<b>Non-Mandatory Pre-Proposal:</b> October 7, 2025 @ 9:00am –2 George St. (near Security Guard station)	
<b>Mailing Date:</b> September 26, 2025	<b>Direct Inquiries to:</b> Robin B. Robinson
<b>Vendor Name:</b>	<b>FEIN/SS#:</b>
<b>Vendor Address:</b>	
<b>City – State – Zip:</b>	
<b>Telephone Number:</b>	<b>Fax Number:</b>
<b>Authorized Signature:</b> _____	<b>Title:</b> _____
<b>Date:</b> _____	
I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. <b>This signed page must be sent in if not sending in a submission.</b>	

To submit a “No Proposal” response for this project, this form must be completed for your company to remain on our Offeror’s list for commodities/services referenced. If you do not respond, your name may be removed from the Offeror’s list.

Please check statement(s) applicable to your “No Proposal” response

- Specifications are restrictive; i.e. geared toward one brand or manufacturer only (explain below).
- Specifications are ambiguous (explain below).
- We are unable to meet specifications.
- Insufficient time to respond to the solicitation.
- Our schedule would not permit us to perform.
- We are unable to meet bond requirements.
- We are unable to meet insurance requirements.
- We do not offer this product or service.
- Remove us from your vendor list for this commodity/service.
- Other (specify below).

**Comments:** \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## References

Offerors must supply a minimum of four (4) references for which they have provided the same or similar services being requested in the Scope of Work. If the references have not used similar services, please outline the services that your company has provided to these clients.

<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____

## **INSURANCE REQUIREMENTS**

Contractors working for the City of Charleston are required to procure and maintain for the duration of their contract with the City insurance against claims for injuries to persons or damages to property, which may arise from or in connection with work performed by the Contractor, his agents, representatives, employees or Subcontractors. The cost of such insurance shall be the responsibility of the Contractor.

- A. The Contractor shall carry liability insurance with a reliable company licensed to do business in South Carolina. Coverage shall be at least broad as:
  1. Insurance Services Office Commercial General Liability Coverage Form ("occurrence") CG 00 01 10 93.
  2. Insurance Services Office Business Auto Coverage Form CA 00 01 6 92 covering automobile liability, code 1 "any auto".
- B. Contractor shall carry workers' compensation as required by the State of South Carolina and Employers Liability insurance (including applicable occupation disease provisions and all state endorsements.)
- C. Contractor shall maintain limits no less than the following:
  1. **GENERAL LIABILITY:** \$1,000,000 combined single limit per occurrence for bodily injury, property damage, and personal injury with a \$2,000,000 general aggregate limit.
  2. **AUTOMOBILE LIABILITY:** \$1,000,000 combined single limit per accident for bodily injury and property damage.
  3. **WORKERS' COMPENSATION:** Statutory limits are required by South Carolina state law and employer's liability limits of \$100,000 per accident.
  4. **PROFESSIONAL LIABILITY:** \$1,000,000 per claim/\$1,000,000 aggregate limit, with a deductible of \$20,000. *(If applicable)*

Contractor shall obtain and maintain a professional liability insurance policy covering the performance of the professional services specified in this agreement. Evidence of such insurance shall be satisfactory in form and content to the owner, the City. This coverage shall be maintained through the duration of this project and for a minimum of 1 year after substantial completion of the project as determined by the City.

The Contractor and any of its subcontractors will cause the professional liability insurance required in this paragraph C.4:

- (a) to be excess insurance over any project professional liability policy, and

- (b) to be primary insurance in the event the project insurance described in Paragraph E is canceled or not maintained, in the event the policy's limits of liability are exhausted, or if the policy expires.

D. Required policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability and Automobile Liability Coverages

The City of Charleston, its officials, employees and volunteers are to be covered as additional insureds as respects: Liability arising out of activities performed by or on behalf of the Contractors; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City of Charleston, its officials, employees or volunteers. To accomplish this objective, the City of Charleston shall be named as an additional insured under the Contractor's general liability policy by attaching Insurance Services Office Commercial General Liability Endorsement CG2010 10 93 (Additional Insured - Owners, Lessees or Contractors - Form B) or its equivalent. Contractors' insurance coverage shall be primary insurance as respects the City of Charleston, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City of Charleston, its officials, employees, or volunteers shall be in excess of the Contractor's insurance and shall not be required to contribute. To accomplish this objective, the following wording should be incorporated in the previously referenced additional insured endorsement.

Other Insurance: This insurance is primary, and our obligations are not affected by any other insurance carried by the additional insured whether primary, excess, contingent or on any other basis.

Any failure to comply with reporting provisions of the Contractor's policies shall not affect coverage provided to the City of Charleston, its officials, employees or volunteers.

2. Workers' Compensation

The Contractor shall agree to waive all rights of subrogation against the City of Charleston, its officials, employees and volunteers for losses arising from work performed by the Contractor for the City of Charleston.

- E. Any deductibles or self-insured retentions shall be the responsibility of the Contractor.
- F. Each insured policy required by the City of Charleston shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice has been given to the City of Charleston.
- G. All coverages for Subcontractors shall be subject to all the requirements stated herein.

- H. Insurance must be placed with an approved insurance company with current Best's rating of A+, A, or A-. Exceptions to this requirement must be approved in writing by the City of Charleston.
- I. Contractor shall furnish the City of Charleston with Certificates of Insurance noting the endorsements. The Certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the City of Charleston, Procurement Division, before work commences. The City of Charleston reserves the right to require complete, certified copies of all required insurance policies, at any time.

Required certificates should be mailed to:

City of Charleston  
Procurement Division  
2 George Street, Ste. 3600  
Charleston, SC 29401

## **INSTRUCTIONS TO OFFERORS**

1. Number of Submittals required is stated in the General Information section of this Solicitation. Proposals must be mailed or hand-delivered. **Responses received by fax or other electronic means (email, CD, etc.) will be rejected.** Proposals must be submitted in a sealed envelope and must be addressed to the City of Charleston Procurement Division, 2 George Street, Suite 3600 Charleston, SC 29401. Failure to do so may result in a premature opening of, or failure to open such Proposal. Each sealed envelope containing a Proposal shall be marked on the outside with the Offeror's complete Name, Address, Solicitation Number, Description of Services Requested by Solicitation (i.e., Elevator Maintenance, Road Construction), along with the Due Date and Time. If you do not choose to submit a proposal, please complete and return the enclosed "No Proposal" response form.

A "No Proposal" qualifies as a response; however, it is the responsibility of the Vendor to notify the Procurement Office if you receive solicitations that do not apply. Failure to respond to three (3) solicitations during the calendar year may result in removal from Vendor's List.

**All pages that require a Signature shall be included with the proposal. Failure to include these required pages may result in the proposal being deemed Non-Responsive.**

2. Offerors must clearly mark as "**Confidential**" each part of their proposal which they consider to be proprietary information that could be exempt from disclosure under the South Carolina Freedom of Information Act, S.C. Code Ann. §§ 30-4-10 to – 165 (2007 & Supp. 2015). See paragraph 45 for more details. The City reserves the right to determine whether this information should be exempt from disclosure and no legal action may be brought against the state or its agents for its determination in this regard.
3. Proposals must be made in the official name of the individual, firm, company, partnership, corporation, joint venture or other legal entity under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the legal entity submitting the proposal.
4. Proposals should be typewritten or computer-generated; however, if this is not possible, the hand writing **must be legible**. A Proposal shall include, but is not limited to, addresses of all legal entities which will participate in the proposed services. The type of organization of the Bidder, whether individual, firm, partnership, corporation, joint venture or other legal entity, shall be stated. Any affiliations, parent-subsidiary relationships, and corporate identities including the names of the principals of such legal entity must be fully disclosed and clearly explained.
5. If an error is made before submitting the proposal, the error should be crossed out, corrections entered and initialed by the person signing the proposal. Erasures or use of typewriter correction fluid may be cause for rejection. No proposal shall be altered or amended after specified time for opening.

6. Proposals may be withdrawn by written request received from the Offeror prior to the time set for opening of Proposals, but not thereafter.
7. Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form and reproducible upon request "at cost" for the City's internal use. The City reserves the right to reproduce proposals for internal use in the evaluation process.
8. All Proposals shall provide a straight forward, concise description of Offeror's ability to satisfy the requirements of the Solicitation.
9. All Addendum and Award Notices will be posted on our website: [www.charleston-sc.gov](http://www.charleston-sc.gov), then click on the Bidline link.
10. The terms and conditions in this Solicitation shall prevail unless otherwise modified by the City of Charleston in an Addendum to this Solicitation. The City of Charleston reserves the right to reject, in whole or in part, any proposal which does not comply with such terms and conditions. The City of Charleston reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Offeror of the conditions contained in this Solicitation, unless clearly and specifically noted in the proposal submitted and confirmed in any resulting contract between the City of Charleston and the Offeror selected.
11. No substitutions shall be considered after the contract award except by Amendment.
12. The City seeks qualified vendors to be responsible for completion of the work described herein and the City reserves the option to award portions of the project to multiple Offeror if such is to the advantage of the City. Therefore, any one proposal submitted by more than one company shall be deemed to be a proposal for a joint venture between or among the companies so submitting proposals unless the proposal clearly and unequivocally describes that only one firm proposes to act as principal and the other firm(s) contractual position is clearly defined. The companies submitting as a joint venture shall be held jointly and severally responsible for the entire project and shall not be permitted to limit their liability to the City.
13. All proposals should be complete and carefully worded and shall convey all of the information requested by the City. If errors or exceptions are found in a proposal, or if the proposal fails to conform to the requirements of the Solicitation, the City shall be the sole judge as to whether that variance is significant enough to reject the proposal.
14. The City reserves the right to request satisfactory evidence of their ability to furnish services in accordance with the terms and conditions listed herein. The City further reserves the right to make the final determination as to the Offeror's ability to provide said services.
15. The Offeror is solely responsible for all costs and expenses associated with the preparation of the proposal and of any supplementary presentation (including any oral presentation) requested by the City.

**16. GRATUITIES AND KICKBACKS**

- A) Gratuities. It shall be unethical for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore.
- B) Kickbacks. It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor, or to hire any subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

**17. OFFEROR REPRESENTATIONS**

Each Offeror by submitting a Proposal represents that:

- A) The Offeror has read and understands this Solicitation (including all Specifications and Attachments) and that its Proposal is made in accordance therewith.
- B) The Offeror has reviewed the Solicitation and has become familiar with the local conditions under which the Scope of Work is to be performed. The failure or omission of an Offeror to acquaint himself with existing conditions shall in no way relieve him of any obligation with respect to this proposal or any resulting contract.
- C) The Proposal is based on the terms, materials, services and obligations required by this Solicitation, without exception.
- D) The Offeror is qualified to provide the services and equipment required under this Solicitation and, if awarded the contract, shall do so in a professional, timely manner using successful Offeror's best skills and attention.
- E) The Offeror is guaranteeing that all goods and services will meet the requirements of the Solicitation during the contract period.

**18. COMPETITIVE PROCUREMENT**

It is the intent and purpose of the City of Charleston that this Solicitation permits competition. It shall be each Offeror's responsibility to advise the City if any language, provision, or other requirement, or any combination thereof, inadvertently restricts or limits the satisfaction of the specifications stated in this Solicitation to a single source. Such notification must be submitted in writing, and must be received by the City of Charleston Procurement Division no later than the last date for written questions. Any such notification shall be reviewed by the City's Procurement Director.

**19. ADDENDA/CHANGES**

Any additions, deletions, modifications, or changes made to this Solicitation shall be processed through the City's Procurement Director. Any deviation from this procedure may result in the disqualification of the proposal or the cancellation of any contract resulting from this Solicitation. Requests for interpretation of this Solicitation and any other questions concerning the Solicitation shall be made in writing, and addressed to the City's Procurement Director, 2 George Street, Suite 3600, Charleston, South Carolina 29401. Questions may be transmitted by fax, but it shall be the responsibility of the sender to confirm receipt by the City. These requests must be submitted by the deadline for written questions. Responses to said requests shall be made at the discretion of the City's Procurement Director. When issued, such interpretations and answers to such questions shall be in the form of an addendum to the Solicitation which shall be posted on the City's website, [www.charleston-sc.gov](http://www.charleston-sc.gov). All such addenda shall become part of the Solicitation and each Offeror shall be bound by such addenda whether or not received by the Offeror. The City of Charleston shall not be legally bound by any amendment or interpretation that is not in writing.

**20. EVALUATION PROCESS**

During the evaluation process the City of Charleston reserves the right, where it may serve the City of Charleston's best interest, to request additional information or clarification from Offerors, or to allow corrections of errors or omissions.

**21. AWARD OF CONTRACT**

- A) Award of contract shall be made to the most responsive and responsible Offeror(s) whose Proposal, conforming to the Solicitation, is most advantageous to the City of Charleston, price and other factors considered.
- B) The City of Charleston may, when in the best interest of the City, reject any or all Proposals or waive technicalities or informalities in any Proposals received.
- C) The City of Charleston shall be the sole judge of the suitability of the items or services to be provided pursuant to this Solicitation.
- D) The City may choose to award to more than one vendor if it is in the best interest of the City.
- E) Final approval may rest with members of the City Council for the City of Charleston.
- F) All things considered equal, a tie proposal will be resolved by the flip of a coin.

**22. CONTRACT ADMINISTRATION**

Questions or problems arising after award of this contract shall be directed to the Contracts Coordinator by calling (843) 965-4184. Copies of all correspondence concerning this contract shall be sent to the Contracts' Coordinator, 2 George Street, Suite 3600 Charleston, SC 29401.

**23. NOTICE OF AWARD OF CONTRACT**

The successful Offeror shall be notified of acceptance of its Proposal by a written Notice of Award of Contract. Successful Offeror(s) shall not undertake any work, and City shall not be responsible for payment for any work whatsoever undertaken by the successful Offeror(s) prior to issuance of the Notice to Proceed.

**24. NOTICE TO PROCEED**

A Notice to Proceed shall be issued after the Contractor(s) has executed the contract and has submitted acceptable Insurance Certificate(s) and Endorsement(s) and Performance and Payment Bonds to the City as well as other submittals specified herein as required to be delivered before the Notice to Proceed is issued. The Contractor(s) shall not commence work until it has received a written Notice to Proceed from the City's Director of Procurement.

**25. OTHER CONTRACTS**

The City of Charleston may undertake or award other contracts for portions of the work or additional work, and the Contractor(s) shall fully cooperate with such other contractors and City of Charleston employees and carefully fit its own work to such work as may be directed by the City. The Contractor(s) shall not commit or permit any act which shall interfere with the performance of work by any other contractor or by City of Charleston employees.

**26. MODIFICATION**

The City's Director of Procurement shall have the unilateral right to modify any contract resulting from this Solicitation, within the general scope of work, when said modification is in the best interest of the City. The right to issue change orders is not dependent upon the consent of the successful Offeror(s). At the direction of the Director of Procurement the successful Offeror is obligated to perform the revised contract. Contract fees or prices shall be equitably adjusted where an issued change order so demands. No claim by the successful Offeror(s) for an adjustment hereunder shall be allowed if asserted after final payment under aforesaid contract.

**27. INDEPENDENT CONTRACTOR**

Successful Offeror is an independent contractor and shall not be deemed the agent or employee of the City of Charleston for any purpose whatsoever.

**28. INSURANCE REQUIREMENTS**

Upon the consummation of the contract for the services being solicited in this Solicitation and receipt of the Notice of Award by the successful Offeror (the "Contractor"), the Contractor shall, at all times during the term of the contract, carry insurance as required by the insurance requirements outlined in the insurance attachment which is attached hereto and incorporated by reference. The City shall not issue a Notice to Proceed until the Contractor has submitted acceptable insurance certificates(s) or endorsement(s), which must be submitted within five (5) calendar days after receipt of the Notice of Award, and which reflect that the required coverages are in place and that all premiums have been paid. Refusal or failure to submit such certificate(s) or endorsement(s) shall constitute grounds for the City to revoke its notice of award, forfeit proposal security, and award the contract to another contractor. The City may contact the Contractor's insurer(s) or insurer(s)' agent(s) directly at any time regarding its coverages, coverage

amounts, or other such relevant and reasonable issues related to this contract. The Contractor(s) shall also require any sub-contractors to carry the same coverages in the same amounts. Faxed Insurance Certificate(s) and Endorsement(s) shall be accepted if received no later than the time of contract execution and the original documents are received within one (1) business day after receipt of the fax transmittals.

**29. INDEMNIFICATION**

The Contractor hereby expressly agrees to indemnify and hold the City harmless against any and all expenses and liabilities arising out of the performance or default of this Agreement as follows:

The Contractor expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or Subcontractors or any person, firm, or corporation directly or indirectly employed by the Contractor, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the City and its employees or by any member of the public, to indemnify and save the City and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs and expenses arising out of the performance or default of this Agreement. Such costs shall include defense, settlement, court costs and reasonable attorneys' fees incurred by the City and its employees. This promise by the Contractor to indemnify the City shall include bodily injuries or death occurring to the City's officers, officials, employees and any person directly or indirectly employed by the City, the City's employees, the employees of any other independent contractors including Subcontractors, or to any member of the public. When the City submits notice, Contractor shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this indemnity obligation. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

**30. OFFEROR'S QUALIFICATIONS**

The City reserves the right to request satisfactory evidence of any Offeror's ability to furnish services in accordance with the terms and conditions listed herein. The City further reserves the right to make the final determination as to the Offeror's ability to provide said services. We reserve the right to investigate the qualifications of any respondent under consideration, require confirmations of information furnished, and require additional evidence of qualifications to perform the work described in this Solicitation, contact references, and request an audited financial statement in order to determine a potential contractor's capabilities.

**31. ASSIGNMENT**

The Contractor(s) shall not assign in whole or in part its duties under the contract without the prior written consent of the City of Charleston. The Contractor shall not assign any money due or to become due to it under this contract without the prior written consent of the City of Charleston.

**32. SUBCONTACTORS**

A) If any subcontractors shall be used for this project, the Contractor shall provide to the City's Director of Procurement a list of names of any of the intended

subcontractors, the subcontractor's applicable license number(s), and a description of the work to be done by each subcontractor, if requested.

- B) The Contractor(s) shall not substitute other subcontractors without the written consent of the City's Director of Procurement.
- C) Contractor(s) shall be responsible for all services performed by a subcontractor. Responsibilities include, but are not limited to, compliance with any applicable licensing regulations.
- D) If at any time the City's Director of Procurement determines that any subcontractor is incompetent or undesirable, he shall notify the Contractor(s) accordingly, and the Contractor(s) shall take immediate steps for cancellation of the subcontract and replacement thereof with a subcontract that is approved by the City of Charleston.
- E) Nothing contained in any contract resulting from this Solicitation shall create any contractual relationship between any subcontractor and the City of Charleston.

**33. SUSPENSION OF WORK**

The City may order the Contractor in writing to suspend, delay, or interrupt all or any part of the Work for such period of time as the City may determine to be appropriate for the convenience of the City of Charleston, or for noncompliance with the contract requirements.

**34. TERMINATION**

- A) **For Convenience:** The City reserves the right to terminate the contract with the Contractor when it is in the best interest of the City, including, but not limited to non-appropriation of funds. If the contract is so terminated, the City shall provide the Contractor with a minimum of thirty (30) days written notice and shall compensate Contractor for all necessary and reasonable direct costs of performing the services actually accomplished as of the date of termination. No other costs shall be allowed for a termination for convenience. No damages shall be allowed for a termination for convenience.
- B) **For Default:** If the Contractor fails to comply with the terms of the contract the City shall notify the Contractor in writing of the specifics regarding such noncompliance. If the Contractor fails to begin to cure the noncompliance within five (5) days after the notice, the City may terminate the contract by written notice to the Contractor with a minimum of thirty (30) days thereafter and Contractor shall only be compensated for services actually completed prior to termination, contractor shall not be entitled to any costs or damages resulting from a termination under this section.

**35. MATERIAL AND WORKMANSHIP; WARRANTIES AND REPRESENTATIONS**

- A) If equipment, materials and supplies are to be a part of the service provided, all equipment, materials, and supplies incorporated in the work covered by the Proposal and provided by the Contractor(s) are to be new and of the most suitable grade for the purpose intended. Unless otherwise specifically provided in this Solicitation, reference to any equipment, material, supply or patented process, by trade name,

make or catalog number, shall not be construed as limiting competition. When requested, the Contractor(s) shall furnish to the City for approval the name of the manufacturer, the model number, and other identifying data and information respecting the performance, capacity, nature and rating of the machinery and mechanical and other equipment which the Contractor(s) contemplates incorporating in the work. When required by this Contract or when called for by the City the Contractor(s) shall provide full information concerning the material or supplies which he contemplates incorporating in the work. Machinery, equipment, material and supplies installed or used without the required prior approval shall be at the risk of subsequent rejection.

- B) By signing its proposal, the successful Offeror(s) shall be deemed to have represented that its staff is knowledgeable about and experienced in performing the work required in this Solicitation and warrants that it shall use best skill and attention to provide the above described work in a professional, timely manner.
- C) The City may, in writing, require the Contractor(s) to remove from the work any employee the City deems incompetent, careless or otherwise objectionable.

**36. COMPLIANCE WITH LEGAL REQUIREMENTS**

All applicable Federal, State and local laws, ordinances, and rules and regulations of any authorities shall be binding upon the Contractor(s) throughout the pendency of this Project. The Contractor(s) shall be responsible for compliance with any such law, ordinance, rule or regulation, and shall hold the City harmless and indemnify same in the event of non-compliance as set forth in the Contract.

**37. PERMITS AND LICENSES**

- A) The Contractor(s) shall, without additional expense to the City of Charleston, be responsible for obtaining all necessary licenses and permits required by the State of South Carolina, or the City of Charleston or any other authority having jurisdiction.
- B) Contractors and subcontractors are responsible at all times for obtaining applicable work permits and licenses of any kind.

**38. DISPUTES**

Any bona fide dispute concerning the bid, proposal, request for qualifications or Agreement shall be resolved by the courts of the State of South Carolina. In the event any litigation is commenced with respect to any matter set forth in the aforementioned documents, the prevailing party shall be entitled to recover reasonable attorneys' fees and all other reasonable direct costs associated with such litigation from the non-prevailing party.

**39. STATE AND LOCAL TAXES**

- A) Except as otherwise provided, contract prices shall *include* all applicable state and local taxes.
- B) If applicable, two percent (2%) income tax withholding shall be withheld from each and every payment pursuant to Sections 12-8-540 and 12-8-550 of the *South Carolina Code of Laws* (1976, as amended) for certain out-of-state contractors, and such sums shall be paid over to the South Carolina Department of Revenue (the

"SCDOR"). When and if the City receives an executed SCDOR Form I-312, Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, such withholding shall cease.

- C) Contractor shall calculate that portion of the contract which is subject to the nine percent (9%) South Carolina sales and/or use tax, which amount shall be itemized and shown on all invoices, and shall be paid to the SCDOR by Contractor. If Contractor is a non-South Carolina company, the City shall withhold said amount from all invoices and remit payment to the SCDOR, unless Contractor furnishes City with a valid South Carolina Use Tax Registration Certificate Number.
- D) Contractor shall indemnify and hold harmless the City for any loss, cost, or expense incurred by, levied upon or billed to the City as a result of Contractor's failure to pay any tax of any type due in connection with the contract.

**40. INCORPORATION BY REFERENCE**

The contents of this Solicitation, including all drawings, attachments, specifications, exhibits, certificates, any addenda, Contractor's Proposal Response Form and Pricing List, and affidavits shall become part of the contract for this Project.

**41. PRIME CONTRACTOR RESPONSIBILITIES**

The contractor shall be required to assume sole responsibility for the complete effort as required by this Solicitation. The City shall consider the contractor to be the sole point of contact with regard to contractual matters.

**42. OWNERSHIP OF MATERIAL**

Ownership of all data, material and documentation originated and prepared for the City pursuant to this contract shall belong exclusively to the City.

**43. DRUG-FREE WORKPLACE**

(Note: This clause applies to any resultant contract of \$50,000 or more). The City of Charleston requires compliance with the South Carolina Drug Free Workplace Act. By submission of a signed proposal, you are certifying that you shall comply with this Act. See S.C. Code Section 44-107-30.

**44. FUNDING**

Offerors shall agree that funds expended for the purposes of the contract must be appropriated by the City of Charleston for each fiscal year included within the contract period. Therefore, the contract shall automatically terminate without penalty or termination costs if such funds are not appropriated. In the event that funds are not appropriated for the contract, the Offeror shall not prohibit or otherwise limit the City's right to pursue and contract for alternate solutions and remedies as deemed necessary by the City for the conduct of its affairs. The requirements stated in this paragraph shall apply to any amendment or the execution of any option to extend the contract.

**45. SUBMITTING CONFIDENTIAL INFORMATION**

For every document Offeror submits in response to or with regard to this Solicitation that is confidential or protected from disclosure, Offeror must separately mark with the word "CONFIDENTIAL" or "PROTECTED" on every page, or portion thereof. By so designating Offeror contends the information is exempt from public disclosure pursuant

to the South Carolina Freedom of Information Act, S.C. Code Ann. §§ 30-4-10 through 4-165 (2007 & Supp. 2015) or other relevant law. For every document Offeror submits in response to or with regard to this Solicitation, Offeror must separately mark with the words "TRADE SECRET" on every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by the South Carolina Trade Secrets Act, S.C. Code Ann. §39-8-10, et seq. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Offeror shall not mark its entire Proposal (bid, proposal, quote, etc.) as confidential, trade secret, or otherwise protected! If a Proposal or any part thereof, is improperly marked as confidential or trade secret or protected, the City may, in its sole discretion, determine it non-responsive. If only portions of a page are subject to some protection, Offeror shall not be allowed to mark the entire page. By submitting a Proposal to this Solicitation, Offeror (1) agrees to the public disclosure of every page of every document regarding this Solicitation that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED," (2) agrees that any information not marked, as required by these bidding instructions, as a "TRADE SECRET" is not a trade secret as defined by the Trade Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, may be subject to public disclosure. In determining whether to release documents, the City shall detrimentally rely on Offeror's marking of documents, as required by these bidding instructions, as being either "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED." By submitting a Proposal, Offeror agrees to defend, indemnify and hold harmless the City of Charleston, its officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from the City withholding information that Offeror marked as "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED."

**46. RECORDS RETENTION & RIGHT TO AUDIT**

The City shall have the right to audit the books and records of the Contractor as they pertain to this contract. Such books and records shall be maintained for a period of three (3) years from the date of final payment under the contract. The City may conduct, or have conducted, performance audits of the Contractor. The City may conduct, or have conducted, audits of specific requirements of this proposal as determined necessary by the City. Pertaining to all audits, the Contractor shall make available to the City access to its computer files containing the history of contract and all other documents related to the audit. Additionally, any software used by the Contractor shall be made available for auditing purposes at no cost to the City.

**47. COST**

Costs submitted with a Proposal shall be firm for a period of at least ninety (90) days from the closing date. All prices shall be firm-fixed type, unless stated otherwise.

**48. UNSUCCESSFUL OFFERORS**

Offerors not awarded a contract under this solicitation, may request return of their proposals within thirty (30) days after notification of award is mailed. All cost of returns shall be paid by the Offeror. If Federal Express, UPS, or other shipping number is not received with request, all materials shall be destroyed.

**49. PAYMENT FOR GOODS & SERVICES**

Payment for goods & services arising out of the contract resulting from this Solicitation and received by the City shall be processed within 30 days of receipt of a valid invoice.

**50. DISCUSSION/NEGOTIATION:**

By submission of a proposal, an Offeror agrees that during the period following issuance of a proposal and prior to final award of contract, the Offeror shall not discuss this Procurement with any party except members of the City's Procurement Division or other parties specifically designated in this solicitation.

**51. NON-DISCRIMINATION**

52. The Contractor(s) shall not discriminate against any individuals based upon age, sex, race, disability, religion, or sexual orientation. The successful Offeror will take affirmative action in complying with all Federal and State requirements concerning fair employment and treatment of all employees, without regard or discrimination by reason of race, color, religion, sex, national origin, or physical handicap.

**53. DEFAULT**

In case of default by the Contractor, the City reserves the right to purchase any or all items in default in the open market, charging the Contractor with any excessive costs. Should such charge be assessed, no subsequent response will be accepted from the defaulting Contractor until the assessed charge has been satisfied.

**54. FORCE MAJURE**

The Contractor shall not be liable for any excess costs if the failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the contractor. Such causes may include, but are not restricted to acts of God or of the public enemy, acts of the Governments in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, and unusually severe weather; but in every case the failure to perform must be beyond the control and without the fault or negligence of the contractor. If the failure to perform is caused by the default of a subcontractor, and if such default arises out of causes beyond the control of both the contractor and subcontractor, and without the fault or negligence of either of them, the contractor shall not be liable for any excess costs for failure to perform, unless the supplies or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the contractor to meet the required delivery schedule.

**55. EXCEPTIONS AND DEVIATIONS**

Any deviation from specifications indicated herein must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and successful Offeror will be held accountable. Deviations must be explained by accompanied documentation identifying and justifying all exceptions and deviations. Unidentified deviations found during the evaluation of the response may be cause for rejection.

**56. PROMPT PAYMENT DISCOUNT TERMS**

Prompt payment discount terms will be calculated from the point of complete order acceptance for services and/or commodities ordered.

**57. REJECTION**

The City reserves the right to reject any proposal that contains prices for individual items or services that are unreasonable when compared with the same or other proposals if such action is in the best interest of the City.

**58. ARBITRATION**

Under no circumstances and with no exception will the City of Charleston act as Arbitrator between the Contractor and any Sub-Contractor.

**59. GUARANTEE AND WARRANTIES**

The Offeror shall state his normal warranty and any extended warranties where available. Excluding any manufacturer's warranties and in addition to other warranties as provided by law or herein, all labor and materials are warranted to be free from defects for a minimum period of twenty-four (24) months after the date of final payment by the City.

**60. PUBLICITY RELEASES**

Contractor agrees not to refer to any award of a contract in commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by the user.

**60. AMENDMENTS**

All questions and written responses, interpretations, corrections or changes to the RFP will be made by Addendum. Addenda will be mailed or otherwise delivered to all Offerors who have notified the City Procurement Division of receipt of the proposal.

**61. WITHDRAWALS**

Proposals may be withdrawn by written request received from the Offeror prior to the time set for opening of Proposals, but not thereafter.

**63. WAIVER**

The City reserves the right to waive any Instruction to Offerors, General or Special Provisions, General or Special Conditions, or specifications deviation if deemed to be in the best interest of the City.

**64. RESPONSE PERIOD**

All responses shall be good for a minimum period of ninety (90) calendar days.

**65. CONTRACT TERMS**

The initial term of the Agreement shall be for one year. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

**Cut along the outer border and affix this label to your sealed bid envelope to identify it as a “Sealed Bid”. Be sure to include the name of the company submitting the bid where requested.**

**SEALED BID  DO NOT OPEN**

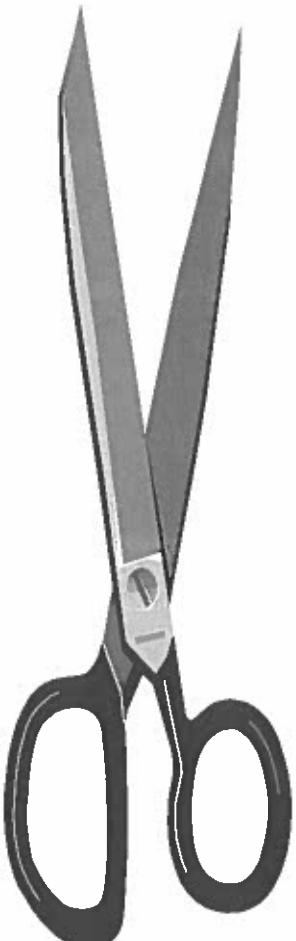
**SEALED BID NO.: 25-P022R**

**BID TITLE: Janitorial Services for the City Municipal Office Building**

**DUE DATE/TIME: October 23, 2025 @ 12:30pm EST**

**SUBMITTED BY: \_\_\_\_\_  
(Name of Company)**

**DELIVER TO: City of Charleston  
Procurement Division  
2 George Street, Ste. 3600  
Charleston, SC 29401**



## **Submittal Checklist**

Responses shall be mailed/delivered in a sealed envelope to the City's Procurement Division no later than and time as shown in this solicitation.

<https://www.charleston-sc.gov/Bids.aspx?CatID=17>

Did an authorized company representative sign:

- The front page of this solicitation?
- The Certificate of Familiarity?
- The bottom portion of this page?

Did an authorized company representative sign the Certificate of Familiarity?

Did you include references if required?

Did you provide a copy of your Certificate of Insurance, if required?

Did you check the City's website for any addenda and include a signed copy of each with your response?

Did you complete and include pricing sheets, if included?

Did you double check to make sure you have included everything requested in this solicitation?

Payment Terms: **NET 30**    Federal ID/SS: \_\_\_\_\_ Unique Entity ID: \_\_\_\_\_

A/R Point of Contact (Name, Phone & Email): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Company Legal Name & DBA: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Remit to Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Person Authorized to Sign: \_\_\_\_\_ Date: \_\_\_\_\_

Printed Name: \_\_\_\_\_ Phone: \_\_\_\_\_

Fax: \_\_\_\_\_ Email Address: \_\_\_\_\_

If you have any concerns, please do not wait until after opening to raise them. **At that point, it is too late. If this solicitation includes a pre-bid conference or a question & answer period, raise your questions during this time.** Please read the bid carefully.

This checklist is included only as a reminder to help Bidders avoid common mistakes. Responsiveness will be evaluated against the solicitation, not against this checklist. You do not need to return this checklist with your response.

## EXHIBIT B

*City of Charleston*  
**Procurement Division**  
2 George Street, Suite 3600  
Charleston, SC 29401



### ADDENDUM #1

T: (843) 724-7314  
F: (843) 724-7354

**DATE:** October 17, 2025

**TO:** All Bidders

**FROM:** Robin B. Robinson

**RE:** 25-P022R – Janitorial Services City MOB

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The due date has been changed from October 23, 2025 to October 28, 2025.  
The time due will remain the same.

If you have any questions, please feel free to call 843-724-7314. Thank you in advance for your cooperation.

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Signature of Acknowledgement

---

Date

---

Company Name

***City of Charleston  
Procurement Division***  
2 George Street, Suite 3600  
Charleston, SC 29401



**ADDENDUM #2 Q&A**

T: (843) 724-7314  
F: (843) 724-7354

**DATE:** October 17, 2025  
**TO:** All Bidders  
**FROM:** Robin B. Robinson  
**RE:** 25-P022R – Janitorial Services City MOB

---

**Q-1 What is the value of the current contract for these services?**

**A-1** The current contract includes the GMC. Those services will not be a part of this contract; therefore, the value for the City side of the current contract is \$130,883.28.

**Q-2 Is the scope of work on this project the same as the current contract? If not, how is it different?**

**A-2** There are small changes due to the separation of the contract with the Gaillard. We share the supervisor in the current contract.

**Q-3 Please clarify the “Unit” and “Total” Price required for the pricing sheet. Should the initial cleaning total be provided in both the “Unit” and “Total” price columns since this is a one-time event?**

**Should the “Unit” price for both 2 George Street and the Police Sub-Station be a monthly total and the “Total” price be a yearly total?**

**A-3** We understand that the initial cleaning is just a one-time cleaning, but please put the amount in both unit and total columns. The unit cost is the monthly amount and the total would be the unit cost times the number of times we have in the quantity. Please keep all cost for Police separate from the City MOB.

**Q-4 Please provide approximate square footage for the Police Sub-Station area of 2 George Street.**

**A-4** The approximate square footage of CPD is 2,048sq. ft.

**Q-5 Please clarify the frequency at which floor hard surfaces are to be stripped and refinished. The section for scheduled frequencies states that corridor floors are to be stripped and finished on a quarterly basis and “all areas” require strip and finish semi-annually. The Service chart on page 20 states that all floor hard surfaces are to be stripped and refinished annually.**

**A-5** The terrazzo floor will not be the responsibility of the contractor awarded this contract. The VCT flooring on the 1<sup>st</sup> floor on both wings, in the breakrooms, offices and bathrooms will be the responsibility of the contractor awarded this contract. This is not a quarterly service, this is annually.

**Q-6 Please confirm that only carpet spot cleaning is required for this contract and that periodic carpet extraction not required.**

**A-6** Spot clean only. If the City needs further carpet cleaning, we will get quotes.

**Q-7 Please provide a flooring square footage breakdown for all areas required under this contract.**

**A-7** We do not have that information.

**Q-8 What is the anticipated award date for this project?**

**A-8** We don't have that information yet. The projected start date for the contract will be March 1, 2026.

**Q-9 What is the contract start date for this project.**

**A-9** The anticipated start date for this contract will be March 1, 2026.

**Q-10 Is the Automobile Liability Insurance required here even though the scope of work doesn't require a vehicle?**

**A-10** The City does require proof of Auto-Insurance coverage.

**Q-11 Are there any more specifics on the supplies needed to be used? For instance, soap and toilet tissue holders use specific types based on the dispensers (usually determined by the brand name).**

**A-11** There is not specific brand required. As long as it fits the dispensers and meets standards, it is acceptable.

**Q-12 Is there a list of the professional/commercial grade equipment that will need to be used?**

**A-12** The proper equipment to clean VCT flooring is what is required.

**Q-13 Does this project include the responsibility of cleaning up hazardous spills or messes, i.e. blood, vomit, etc.?**

**A-13** It could potentially if a situation occurred.

**Q-14 Why do you feel like it is necessary that you have a Dayporter and Supervisor for 8 hours M-F?**

**A-14** The City prefers to have 2 people onsite. The City is open to an alternate solution that would best fit our needs.

**Q-15 To clarify, are you wanting a “dedicated” supervisor assigned only to MOB or can the contractor have a Full Time Supervisor/Operations Manager that oversees the account?**

**A-15** See A-14

**Q-16 Is the City ok with paying for both a Dayporter and a Supervisor?**

**A-16** The City is willing to pay any and all valid invoices.

**Q-17 What specific task will the supervisor be responsible for, other than overseeing the day porter?**

**A-17** Making sure there are enough supplies, making sure tasks are done as they should be and assisting where and when needed.

**Q-18 If we believe we can successfully operate this project without a daytime supervisor and provide evidence to support our case, may we bid it without jeopardizing the evaluation of our bid?**

**A-18** See A-14.

**Q-19 What are your main challenges with your current service provider?**

**A-19** Effectively cleaning the bathrooms, floors, vacuuming, and dusting.

**Q-20 What is your current level of satisfaction with your vendor? (1 poor to 10 excellent)**

**A-20** 5 - 6

**Q-21 How do you communicate with contract leadership/management?**

**A-21** Either the Facilities Director is addressing concerns/issues and/or Procurement is. The Procurement Contract Coordinator is the primary point of contact for this contract.

**Q-22 How is routine or scheduled carpet maintenance performed/handled?**

**A-22** This is done after hours.

**Q-23 Is there any exterior cleaning, pulling trash, maintaining exterior entrance ways, picking up trash outside or in flower beds?**

**A-23** That is not a part of this contract.

**Q-24 Page 8 references “common areas.” Are these interior common areas only?**

**A-24** Yes, these are interior common areas only.

**Q-25 Is the current vendor being considered for renewal or is this a new restructure for a new vendor?**

**A-25** We extended the contract for 6 months beyond the expiration date to resolicit and restructure our specifications. The current contractor is welcome to resubmit if they desire. Our normal contract terms are 1 year with 4 – 1 year options as stated in this RFP.

**Q-26 Do you accept an hourly rate for special event staffing if needed, or does this have to be included in the main bid?**

**A-26** There are no special event needs for the City. Please disregard that part in the last sentence at the top of page 8 (“...but will also include special events as needed.”).

**Q-27 Do you have a breakdown of square footage of carpet vs. hard surface for each building or a total of both?**

**A-27** We do not have that information.

**Q-28 Do you have a total number of toilets/urinals for both buildings?**

**A-28** On the 1<sup>st</sup> floor (east & west wings), there are approximately 3 urinals and 3 toilets for the men's restrooms, and approximately 4-5 toilets for the women's restrooms, and there is a unisex restroom near the call center on the 1<sup>st</sup> floor.

In the CPD substation on the 1<sup>st</sup> floor, there are 2 showers and approximately 3 restrooms.

On the 2<sup>nd</sup> and 3<sup>rd</sup> floor there is 1 men's and 1 women's restroom on each wing. The men's has 1 urinal and 1 toilet. The women's has 2 toilets. Therefore the 2<sup>nd</sup> and 3<sup>rd</sup> floor east and west wing has a total of 4 men's toilets and 4 urinals, and women's has 8 toilets.

In addition, on the 2<sup>nd</sup> floor, there are 3 showers and there is a toilet in each shower

**Q-29 Is there a total number of offices/cubicles for both buildings?**

**A-29** There are approximately 13 offices on the 1<sup>st</sup> floor, approximately 27 on the 2<sup>nd</sup> floor, and approximately 22 on the 3<sup>rd</sup> floor. There are been modifications done, so it is difficult to say how many cubicles there are on each floor. The numbers given cover the east and west wing of the building.

**Q-30 Parking – Does GMC/MOB provide any parking passes or a validation process?**

**A-30** A temporary parking pass may be provided to the contract employees for a duration of time. They can be extended if needed and at the City's discretion. See page

**Q-31 Is there an office/cubicle provided for the contractor's on-site manager or supervisor?**

**A-31** There is a table/desk available.

**Q-32 Is there a secure area provided for contractor employees' personal items? Keys/Purses, etc.?**

**A-32** There are lockers available.

**Q-33 Would CRI/HEPA approved backpack vacuums be accepted for carpet care?**

**A-33** Only if they are the ProTeam brand of backpack vacuum.

**Q-34 Do you have a current approximate number of total full-time employees in both east/west office building suites?**

**A-34** Please see page 8, 3<sup>rd</sup> paragraph: “*There are approximately 150 employees in the Municipal Office Building.*”

**Q-35 Are there any charge back costs to the vendors for any “badge access” badges or keys?**

**A-35** Badges and keys are assigned. If lost, there will be charges, but not on the initial exchange.

**Q-36 How many total stairwells for the MOB vs. Gaillard?**

**A-36** There are approximately 2 stairwells responsible under this contract.

**Q-37 Estimated start contract date is 3/1/2026?**

**A-37** Correct.

**Q-38 All product deliveries are to be labeled Anson St. Dock?**

**A-38** They need to specifically say City of Charleston Anson Street dock.

**Q-39 In the monthly cleaning for 2 George St. and the Police substations, should the monthly price include the annual strip and finish, and the monthly scrub and recoat, buffing, machine restroom scrubbing, and the lobby maintenance as specified be included in the monthly cleaning price?**

**A-39** Annual strip and refinish should be listed as a separate line item.

**Q-40 The RFP schedule Matrix on page 13 under Scheduled Frequencies – Semi-Annual Typical Requirements states that sweep, strip and refinishing is to be completed Semi-Annually, while page 20 specifies that a complete strip and recoat must be completed annually. At which frequency should strip and refinish be completed?**

**A-40** This is annually, not semi-annually.

**Q-41 Likewise, the carpet full bonnet clean / dirt extraction is stated to be completed semi-annually in the requirements, but is not designated in the matrix. Is this to be completed annually or semi-annually?**

**A-41** This is not a part of this contract. There is no need to provide a cost for this service.

**Q-42** **What is the square footage of VCT tile that needs to be strip and waxed annually, as well as buffed and recoated monthly?**

**A-42** We do not have that information.

**Q-43** **Page 13 states, “Some areas will require twice-a-day cleaning. Such areas are to be mutually agreed upon by Contractor and City of Charleston.” Under miscellaneous requirements. What areas require twice-a-day cleaning?**

**A-43** Potentially breakrooms and bathrooms.

**Q-44** **In the RFP, it states the nightly cleaning is from 6pm – 10pm. Could the cleaning extend beyond 10pm or must the cleaning be complete by 10pm every night?**

**A-44** Cleaning should not extend beyond midnight.

**Q-45** **What factors would eliminate a vendor’s proposal from being considered?**

**A-45** Being late.

**Q-46** **Is it possible to ask for a copy of the current cleaning schedule along with the pricing on it?**

**A-46** That information can be requested via FOIA, <https://www.charleston-sc.gov/801/Freedom-of-Information-Act-Request-FOIA>.

If you have any questions, please feel free to call 843-724-7314. Thank you in advance for your cooperation.

---

Signature of Acknowledgement

---

Date

---

Company Name

## EXHIBIT C

### INSURANCE REQUIREMENTS

Contractors working for the City of Charleston are required to procure and maintain for the duration of their contract with the City insurance against claims for injuries to persons or damages to property which may arise from or in connection with work performed by the Contractor, his agents, representatives, employees or Subcontractors. The cost of such insurance shall be the responsibility of the Contractor.

- A. The Contractor shall carry liability insurance with a reliable company licensed to do business in South Carolina. Coverage shall be at least broad as:
  1. Insurance Services Office Commercial General Liability Coverage Form ("occurrence") CG 00 01 10 93.
  2. Insurance Services Office Business Auto Coverage Form CA 00 01 6 92 covering automobile liability, code 1 "any auto".
- B. Contractor shall carry workers' compensation as required by the State of South Carolina and Employers Liability insurance (including applicable occupation disease provisions and all state endorsements.)
- C. Contractor shall maintain limits no less than the following:
  1. **GENERAL LIABILITY:** \$1,000,000 combined single limit per occurrence for bodily injury, property damage, and personal injury with a \$2,000,000 general aggregate limit.
  2. **AUTOMOBILE LIABILITY:** \$1,000,000 combined single limit per accident for bodily injury and property damage.
  3. **WORKERS' COMPENSATION:** Statutory limits are required by South Carolina state law, and employer's liability limits of \$100,000 per accident.
  4. **PROFESSIONAL LIABILITY:** \$1,000,000 per claim/\$1,000,000 aggregate limit, with a deductible of \$20,000.

Contractor shall obtain and maintain a professional liability insurance policy covering the performance of the professional services specified in this agreement. Evidence of such insurance shall be satisfactory in form and content to the owner, the City. This coverage shall be maintained through the duration of this project and for a minimum of 1 year after substantial completion of the project as determined by the City.

The Contractor and any of its subcontractors will cause the professional liability insurance required in this paragraph C.4:

- (a) to be excess insurance over any project professional liability policy, and
- (b) to be primary insurance in the event the project insurance described in Paragraph E is canceled or not maintained, in the event the policy's limits of liability are exhausted, or if the policy expires.

D. Required policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability and Automobile Liability Coverages

The City of Charleston, its officials, employees and volunteers are to be covered as additional insureds as respects: Liability arising out of activities performed by or on behalf of the Contractors; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City of Charleston, its officials, employees or volunteers. To accomplish this objective, the City of Charleston shall be named as an additional insured under the Contractor's general liability policy by attaching Insurance Services Office Commercial General Liability Endorsement CG2010 10 93 (Additional Insured - Owners, Lessees or Contractors - Form B) or its equivalent. Contractors' insurance coverage shall be primary insurance as respects the City of Charleston, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City of Charleston, its officials, employees, or volunteers shall be in excess of the Contractor's insurance and shall not be required to contribute. To accomplish this objective, the following wording should be incorporated in the previously referenced additional insured endorsement.

Other Insurance: This insurance is primary, and our obligations are not affected by any other insurance carried by the additional insured whether primary, excess, contingent or on any other basis.

Any failure to comply with reporting provisions of the Contractor's policies shall not affect coverage provided to the City of Charleston, its officials, employees or volunteers.

2. Workers' Compensation

The Contractor shall agree to waive all rights of subrogation against the City of Charleston, its officials, employees and volunteers for losses arising from work performed by the Contractor for the City of Charleston.

E. Any deductibles or self-insured retentions shall be the responsibility of the Contractor.

- F. Each insured policy required by the City of Charleston shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice has been given to the City of Charleston.
- G. All coverages for Subcontractors shall be subject to all the requirements stated herein.
- H. Insurance must be placed with an approved insurance company with current Best's rating of A+, A, or A-. Exceptions to this requirement must be approved in writing by the City of Charleston.
- I. Contractor shall furnish the City of Charleston with Certificates of Insurance noting the endorsements. The Certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the City of Charleston, Procurement Division, before work commences. The City of Charleston reserves the right to require complete, certified copies of all required insurance policies, at any time.

Required certificates should be mailed to:

City of Charleston  
Procurement Division  
2 George Street, Suite 3600  
Charleston, SC 29401

## **EXHIBIT D**



**elite touch**  
CLEANING SERVICES

**ORIGINAL**

**CONFIDENTIAL**

7716 England St. Ste. B Charlotte, NC 28273  
O. 704-266-0623 F 704-733-9337  
EliteTouchCleaning.com



**The City of Charleston**  
**Procurement Division**  
2 George Street, Suite 3600  
Charleston, South Carolina 29401  
P) 843-724-7312 F) 843-724-7354  
[www.charleston-sc.gov](http://www.charleston-sc.gov)

<b>Proposal Number:</b> 25-P022R <b>Proposals will be received until:</b> October 23, 2025 @ 12:30pm	
<b>Proposal Title:</b> Janitorial Services for the City Municipal Office Building	
<b>Non-Mandatory Pre-Proposal:</b> October 7, 2025 @ 9:00am – 2 George St. (near Security Guard station)	
<b>Mailing Date:</b> September 26, 2025	<b>Direct Inquiries to:</b> Robin B. Robinson
<b>Vendor Name:</b> Elite Touch Cleaning Services Inc. <b>FEIN/SS#:</b> 600768728	
<b>Vendor Address:</b> 7716 England St #B	
<b>City – State – Zip:</b> Charlotte NC 28273	
<b>Telephone Number:</b> 704 266 0623	<b>Fax Number:</b>
<b>Minority or Women Owned Business:</b> Are you a certified Minority or Women-Owned business in the State of South Carolina? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No If so, please provide a copy of your certificate with your response	
<b>Authorized Signature:</b>	<b>Title:</b> Director of Sales
<b>Date:</b> 10/23/25	
I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. This signed page must be included with bid submission.	

#### **IMPORTANT**

1. This solicitation seeks proposals responding to the Scope of Work for a **Janitorial Services for the City Municipal Office Building**. This solicitation does not commit the City of Charleston to award a contract, to pay any costs incurred in the preparation of applications submitted, or to procure or contract for the services. The City reserves the right to accept or reject any, all or any part of any proposal received as a result of this Solicitation, or to cancel in part or in its entirety this Solicitation if it is in the best interest of the City to do so. The City shall be the sole judge as to whether proposals submitted meet all requirements contained in this solicitation.
2. Offeror may **mail**, or **hand-deliver** response to the Procurement Division. **Do Not Fax** in the proposal response. Please show the solicitation number on the outside of any mailing package. The City of Charleston assumes no responsibility for unmarked or improperly marked envelopes. If directing any other correspondence to the Procurement Division not related to the solicitation, please do not include the solicitation number on the envelope. If the Bidder chooses not to respond to this solicitation, it is recommended to return the "No Proposal Response Form" to our office.
3. **DEADLINE FOR SUBMISSION OF OFFER:** Any proposal or offer received after the Procurement Director or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the proposal opening.
4. Questions regarding this solicitation **must be submitted in writing** to Robin B. Robinson **no later than 1:00pm on October 8, 2025**. Questions may either be faxed to 843-724-7354 or emailed to Robin B. Robinson, [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov).

**ORIGINAL** 1

#25-P022R Janitorial Services City MOB, 2 George St.

**Company Name** Elite Touch Cleaning Services Inc

**Business Information**

Date Business Established 2007

**Check one:**

Proprietorship

Partnership

Corporation

**Total Business Income (from Janitorial Services)**

Fiscal Year to Date \$ 5,000,000

Fiscal Year Began January 1

Last Fiscal Year \$ 7,500,000

Fiscal Year Began January 1

**NOTE:** The Successful Bidder should be prepared to furnish a complete Financial Statement within five (5) days after notification of award, if requested.

The Successful Bidder should also be prepared to provide their Certificate of Insurance within five (5) days after notification of award.

**ORIGINAL** <sup>22</sup>

Proposal Number: 25-P022R	Proposals will be received until: October 23, 2025 @ 12:30pm
Proposal Title: Janitorial Services for the City Municipal Office Building	
Non-Mandatory Pre-Proposal: October 7, 2025 @ 9:00am -2 George St. (near Security Guard station)	
Mailing Date: September 26, 2025	Direct Inquiries to: Robin B. Robinson

### CERTIFICATE OF FAMILIARITY

The undersigned, having fully familiarized himself with the information contained within this entire solicitation and applicable amendments, submits the attached proposal, and other applicable information to the City, which I verify to be true and correct to the best of my knowledge. I further certify that this proposal response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, equipment or services in all respects, fair and without collusion or fraud. I agree to proposal by all conditions of this solicitation and certify that I am authorized to sign this proposal. I further certify all prices submitted shall remain effective for a minimum period of ninety (90) days, unless otherwise stated.

**Elite Touch Cleaning Services Inc**

Company Name  
As registered with the IRS

7716 England St #B

Correspondence Address  
Charlotte NC 28273  
City, State, Zip

kyle@elitetouchcleaning.com

Email

7716 England St #B

Remittance Address  
Charlotte NC 28273  
City, State, Zip

600768728

Federal Tax ID (FEIN)/SS Number



Authorized Signature

Kyle Fisher

Printed Name

Director of Sales

Title

704 903 3766

Telephone Number/Toll Free Also (If Available)

Fax Number

10/23/25

Date

SC Sales Tax Number

**Minority or Women-Owned Business:**

Are you a certified Minority or Women-Owned business in the State of SC?

Yes       No

If so, please provide a copy of your certificate with your response.

**ORIGINAL** 24

## References

Offerors must supply a minimum of four (4) references for which they have provided the same or similar services being requested in the Scope of Work. If the references have not used similar services, please outline the services that your company has provided to these clients.

Name: <u>Julia Pererva</u>
Address: <u>151 Meeting Street,</u>
<u>Charleston, SC, 29401</u>
Phone/Fax: <u>704 689 3203</u>
Email: <u>julia.pererva@latpurser.com</u>
Name: <u>Steve Banner</u>
Address: <u>4201 Congress St #170</u>
<u>Charlotte NC 28209</u>
Phone/Fax: <u>704 632 7612</u>
Email: <u>sbanner@srenc.com</u>
Name: <u>Charise Jenkins</u>
Address: <u>10420 Harris Oaks Blvd Ste R</u>
<u>Charlotte NC 28269</u>
Phone/Fax: <u>704 919 6743</u>
Email: _____
Name: <u>Sheila Proctor</u>
Address: <u>2400 South Blvd, #300</u>
<u>Charlotte NC 28203</u>
Phone/Fax: <u>704.367-5023</u>
Email: <u>sproctor@mpvre.com</u>
Name: _____
Address: _____
Phone/Fax: _____
Email: _____

**ORIGINAL<sup>26</sup>**

## **MWBE Compliance Provisions and Instructions Minority/Women Business Enterprise Program Forms**

This Project is covered under the City of Charleston's Minority/Women Business Enterprise (MWBE) Program, administered by Ruth Jordan, MBE Manager, 91 Hanover Street, Charleston SC, 29403, (843) 724-7434.

The City has established goals for both Minority Business Enterprises (MBE) and Women Business Enterprises (WBE). An MBE is a small business owned and controlled by a minority. A WBE is a small business owned and controlled by a woman. The minority or woman must own fifty-one percent (51%) of the business and they must control the management and daily operations of the business in order to qualify.

Charleston City Council has adopted a policy setting 20% MWBE participation as the goal for this project. In order to meet this goal, the MBE/WBE subcontractors must have a Certificate of Eligibility on file with the City's Minority Business Enterprise Office or a reciprocal certification at the time of execution of the contract. All bidders must document the extent of their effort to meet this goal by completing the MWBE Compliance Affidavits below.

A list of certified minority and women-owned firms can be found on the City of Charleston's web site [www.charleston-sc.gov](http://www.charleston-sc.gov) under "BIDLINE" link or by contacting Ruth Jordan, MBE Manager, 91 Hanover Street, Charleston SC, 29403, (843) 724-7434, [jordan@charleston-sc.gov](mailto:jordan@charleston-sc.gov).

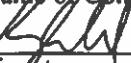
### **COMPLIANCE REQUIREMENTS:**

The Bidder shall provide, with their bid form submittal, the following Affidavits properly executed which signify that the Bidder understands and agrees to abide by the City's MWBE Compliance Provisions. All Bidders must provide either (a) Affidavits A and B or (b) Affidavit C. If a Bidder provides Affidavit C, the Bidder does not need to provide Affidavits A or C.

- Affidavit A - Listing of the Good Faith Effort to Identify & Secure Minority and Women-owned Business Participation.**  
**AND**
- Affidavit B – Work to be Performed by Minority and/or Women-owned Firms**  
**OR**
- Affidavit C – Intent to Perform Contract with Own Workforce**, in making this certification the Bidder states that the Bidder does not customarily subcontract elements of this type of Project and will perform all elements of the work with his/her own current work forces.

Failure to comply with any of the statements, certifications, or intentions stated in the affidavits, or the MBE/WBE compliance provisions shall constitute a breach of the Contract. Any such breach may result in termination of the Contract in accordance with the termination provisions contained in the Contract. It shall be solely at the option of the City of Charleston whether to terminate the contract for breach. In addition to terminating the Contract, the bidder may be prohibited from participation in future solicitations as determined by the City of Charleston.

Name of Company: Elite Touch Cleaning Services Inc

  
Signature

Kyle Fisher

Print Name  
Molly Scialabba

Witness

10/23/25

Date

Director of Sales

Title

**ORIGINAL**<sup>27</sup>

AFFIDAVIT A  
Page 1 of 2

City of Charleston, South Carolina Listing of the Good Faith Effort

Affidavit of Elite Touch Cleaning Services Inc

(Name of Bidder)

I have made a good faith effort to comply with the City of Charleston's MWBE compliance provisions under the following checked areas:

(A minimum of 6 areas must be checked in order to have achieved a "good faith effort")

- 1. Contacted MWBE businesses that reasonably could have been expected to submit a quote and that were known to the Bidder, or available on Federal, State or local government maintained lists, at least 10 business days before the submittal date and notified them of the nature and scope of the work to be performed. *Complete Affidavit A, Page 2.*
- 2. Followed up with contacted MWBE subsequent to the initial contact and at least 72 hours prior to submittal deadline/bid opening either by phone, facsimile or in person.
- 3. Made the construction plans, specifications, and requirements available for review by prospective MWBE businesses, or providing these documents to them at least 10 business days before the submittal deadline/bid opening.
- 4. Itemized elements of the work or combined elements of the work into economically feasible units to facilitate MWBE participation.
- 5. Attended any pre-solicitation meetings scheduled by the City.
- 6. Provided MWBE assistance with getting required bonding or insurance requirements or provided alternatives to bonding or insurance.
- 7. Negotiated in good faith with interested MWBEs and did not reject them as unqualified without sound reasons based on their capabilities. *(Any rejection of a minority or woman-owned business based on lack of qualifications shall include reasons for rejection documented in writing.)*
- 8. Provided MWBEs assistance with securing needed equipment, loan capital, lines of credit, or joint pay agreements to secure loans, supplies, or letters of credit, including waiving credit that is ordinarily required. Assisted MWBEs in obtaining the same unit pricing with the Bidder's suppliers in order to help such businesses in establishing credit.
- 9. Provided training or mentoring to at least two (2) MWBEs within 120 days prior to submittal deadline/bid opening. The training or mentoring program should be in conjunction with local trade groups, technical schools or community organizations that provide recruitment, education or skill levels.
- 10. Negotiated joint venture, partnership or other similar arrangements with MWBEs in order to increase opportunities for MWBE participation.
- 11. Provided quick pay agreements and policies to enable MWBE contractors and suppliers to meet cash-flow demands.

I hereby agree to enter into a formal agreement with the firms listed in Affidavit B Work to be performed by Minority Firms conditional upon execution of a contract with the Owner. Failure to abide by this provision will constitute a breach of the contract.

I hereby certify that I have read and agree to the terms of the Minority / Women-Owned Business Enterprise Program, and I am the Bidder or I am authorized to bind the Bidder to the commitment herein set forth.

Date: 10/23/25

Name of Authorized Officer (Print/Type): Kyle Fisher

Signature: 

Title: Director of Sales

ORIGINAL<sup>28</sup>

## AFFIDAVIT C

### City of Charleston, South Carolina Intent to Perform Contract with Own Workforce.

Affidavit of Elite Touch Cleaning Services Inc

(Name of Bidder)

I hereby certify that it is our intent to perform 100% of the work required for the \_\_\_\_\_

RFP 25-P022R Janitorial Services City Municipal Office Building RFP contract.  
(Name of Project)

In making this certification, the Bidder states that the Bidder does not customarily subcontract elements of this type Project, and normally performs and has the capability to perform and will perform all the elements of the work on this Project with his/her own current work forces, and

The Bidder agrees to provide any additional information or documentation requested by the Owner in support of the above statement.

I hereby certify that I have read this certification and I am the Bidder or I am authorized to bind the Bidder to the commitments contained herein. I certify, under penalties of perjury, that I have examined the information in this affidavit, and to the best of my knowledge and belief, this information is true, correct and complete.

Date: 10/23/25

Name of Authorized Officer (Print/Type): Kyle Fisher

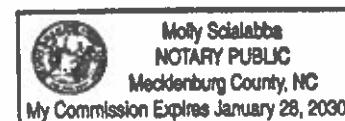
Signature: 

Title: Director of Sales

Sworn to before me this 15 day of OCTOBER, 2025  
Notary Public for the State of North Carolina

Notary Seal:

My Commission Expires: \_\_\_\_\_  
Print Name: Molly Scialabba  
Phone Number: 704 266 0623  
Address: 7716 England St #B  
Charlotte NC 28273



**ORIGINAL** <sup>31</sup>

## Submittal Checklist

Responses shall be mailed/delivered in a sealed envelope to the City's Procurement Division no later than and time as shown in this solicitation.  
<https://www.charleston-sc.gov/Bids.aspx?CatID=17>

Did an authorized company representative sign:

- The front page of this solicitation?
- The Certificate of Familiarity?
- The WMBE Compliance Provisions form?
- The applicable WMBE Affidavit (and had notarized)?
- The bottom portion of this page?

Did an authorized company representative sign the Certificate of Familiarity?

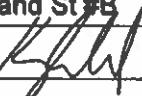
Did you include references if required?

Did you provide a copy of your Certificate of Insurance, if required?

Did you check the City's website for any addenda and include a signed copy of each with your response?

Did you complete and include pricing sheets, if included?

Did you double check to make sure you have included everything requested in this solicitation?

Payment Terms: NET 30	Federal ID/SS: 600768728	Unique Entity ID:
A/R Point of Contact (Name, Phone & Email): Marcela Marulanda 704 266 0623    marcela@elitetouchcleaning.com    accounting@elitetouchcleaning.com		
Company Legal Name & DBA: Elite Touch Cleaning Services Inc		
Remit to Address: 7716 England St #B		
Person Authorized to Sign:		Date: 10/23/25
Printed Name:	Kyle Fisher	Phone: 704 903 3766
Fax:		Email Address: kyle@elitetouchcleaning.com

If you have any concerns, please do not wait until after opening to raise them. At that point, it is too late. If this solicitation includes a pre-bid conference or a question & answer period, raise your questions during this time. Please read the bid carefully.

This checklist is included only as a reminder to help Bidders avoid common mistakes. Responsiveness will be evaluated against the solicitation, not against this checklist. You do not need to return this checklist with your response.

**ORIGINAL** 47



October 23, 2025

Robin Robinson  
Senior Buyer  
City of Charleston Procurement Division  
2 George Street, Suite 3600  
Charleston, SC 29401

Robin,

Thank you for the opportunity to submit our proposal for janitorial services at the City of Charleston's Municipal Office Building and Police Sub-Station. We approached this project with a partnership mindset...focused on what will truly serve the City best long-term, not just what meets the RFP on paper.

Our plan centers on **real savings and smarter resource use**. We removed a redundant day porter position and reallocated responsibilities under a single **Senior Day Porter with structured night supervision**; we created a leaner system that **cuts annual labor costs by more than \$50,000 while improving accountability and daily responsiveness**. Oversight is supported through the Swept platform, giving the City documented proof of performance and real-time visibility into operations. The result is **lean, honest, and service-focused**.

Our team also reviewed the City's original scope line by line to deliver **more effective service at the same cost**. By realigning labor and adjusting task frequencies, we improved coverage in high-use areas while eliminating tasks that added cost but limited impact. The outcome is a plan that achieves **greater value, cleaner results, and measurable efficiency—without compromising quality**.

To demonstrate our commitment to partnership, we're including a **complimentary tile and grout restoration** for restroom and locker room floors at no cost to the City. This investment reflects our belief that strong relationships are built through action—enhancing cleanliness and presentation from the first day of service.

We're proud to already maintain **Liberty Center**, located less than half a mile from the **Municipal Office Building**, under a similar scope. That proximity and experience give us firsthand understanding of Charleston's expectations and operating rhythm, ensuring a seamless transition and dependable performance.

We view this not as a contract, but as a partnership built on trust. With this approach, **we will succeed - together**.

*Kyle Fisher*



**ORIGINAL**

## Company Overview – Elite Touch Cleaning

### Built on experience that understands the work.

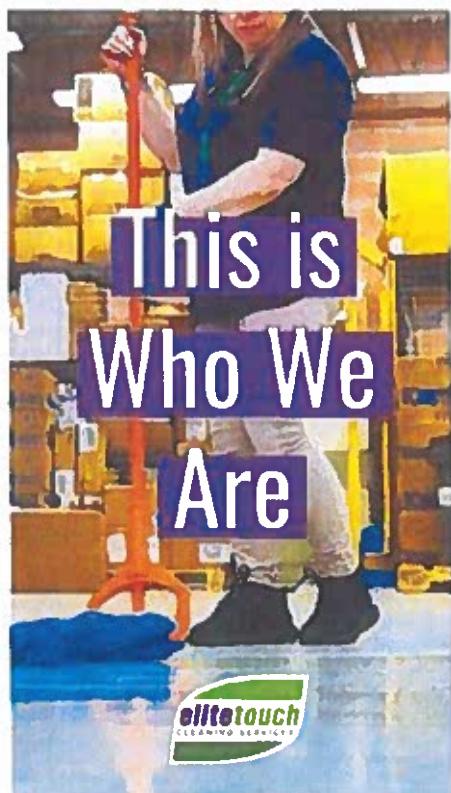
Elite Touch Cleaning is a professional janitorial firm based in Charlotte, North Carolina, serving clients across the Carolinas since 2007. The company was founded by **Mario Mendigana**, who began his career as both a day porter and night cleaner before building the business through hands-on performance. That foundation continues to guide how we operate today by **investing in people, setting clear expectations, and delivering consistent results** in facilities that require reliability and accountability.

### Trusted by municipalities and high-traffic facilities.

Elite Touch Cleaning maintains more than **four million square feet** of space daily, including municipal buildings, public service offices, corporate headquarters, healthcare facilities, and industrial environments. Our team understands the expectations of government contracts which include **professionalism, background screening, and reliability**.

### W-2 employees only, trained, uniformed, and accountable.

All Elite Touch employees are direct W-2 employees. Each team member completes **background checks, reference verification, safety orientation, and training** before being assigned to a client facility. Crews are uniformed, English-speaking, and supervised on-site to maintain the professionalism and public trust required in municipal environments.



### Technology-driven transparency.

All field operations are managed through Swept, our janitorial management software that can provide GPS-based check-ins, task verification, and photo documentation. This system gives the City full visibility into **task completion, inspection results, and corrective actions**, ensuring any issues are tracked and resolved promptly.

### Certified, local, and performance proven.

We're a certified **Minority Business Enterprise (MBE)** and **Small Business Enterprise (SBE)** with a client retention rate above 95 percent. Our performance record includes multi-year municipal, healthcare, and commercial contracts throughout the Carolinas.

### Committed to value and long-term partnership.

Our mission is clear: **clean facilities, consistent communication, and measurable accountability**. Every element of our proposal for the City of Charleston reflects this goal through properly trained staff, transparent reporting, and a partnership approach built on dependable results and continuous improvement.

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## Service Approach and Transition

Elite Touch Cleaning's approach is designed to provide a seamless, well-managed transition into the City's Municipal Office Building (MOB) and Police Sub-Station contract with no service interruption. Our program begins with a structured implementation process that establishes accountability, sets the performance standard from day one, and ensures compliance with all City quality control and reporting requirements.

Our service model emphasizes **well-compensated staff, direct supervision, transparent communication, and technology-supported performance tracking**. Every element of the program is built to deliver reliable, consistent cleaning that aligns with the City's expectations for professionalism and responsiveness.

Phase	Timeline	Primary Actions	Deliverables / Outcomes
<b>Phase 1 – Award &amp; Mobilization</b>	Week 1	<ul style="list-style-type: none"><li>• Submit all insurance certificates, W-9, and compliance documentation.</li><li>• Conduct kickoff meeting with City Procurement and Facilities teams.</li><li>• Confirm access credentials, janitor closet staging, and security procedures.</li><li>• Joint walkthrough with City to verify scope and identify any immediate needs.</li><li>• Stage all equipment and consumables.</li><li>• Load site-specific schedules and inspection checklists into Swept software.</li><li>• Verify compatibility of consumable dispensers.</li></ul>	<ul style="list-style-type: none"><li>• Administrative setup complete.</li><li>• Mobilization plan approved.</li><li>• City points of contact established.</li></ul>
<b>Phase 2 – Site Walkthrough &amp; Startup Prep</b>	Week 1-2	<ul style="list-style-type: none"><li>• Stage all equipment and consumables.</li><li>• Load site-specific schedules and inspection checklists into Swept software.</li><li>• Verify compatibility of consumable dispensers.</li><li>• Train staff on building layout, safety, and emergency procedures.</li><li>• Begin soft launch with oversight from City staff.</li></ul>	<ul style="list-style-type: none"><li>• Cleaning schedules approved.</li><li>• Equipment and supply inventory staged.</li><li>• Swept system fully configured for tracking.</li></ul>
<b>Phase 3 –Transition</b>	Week 2-3		<ul style="list-style-type: none"><li>• Facility reset completed.</li><li>• Staff fully oriented.</li><li>• Baseline quality inspection completed and documented.</li></ul>

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<b>Phase 4 – Full Operations Launch</b>	<b>Week 4</b>	<ul style="list-style-type: none"> <li>Conduct full-building deep cleaning to establish baseline quality level.</li> <li>Include complimentary tile and grout cleaning for restroom and locker/shower floors.</li> <li>Begin full recurring schedule: 1 Senior Day Porter, 1 Evening Supervisor, and 2 Night Cleaners.</li> <li>Establish daily communication through Swept dashboard and direct contact logs.</li> <li>Deliver initial weekly performance report to City Contract Manager.</li> </ul>	<ul style="list-style-type: none"> <li>Operations fully active.</li> <li>Communication and reporting protocols live.</li> <li>City receives weekly status report.</li> </ul>
<b>Phase 5 – Ongoing Oversight &amp; Quality Control</b>	<b>Ongoing</b>	<ul style="list-style-type: none"> <li>Weekly Area Manager inspections and staff evaluations.</li> <li>Monthly quality reports with photo documentation.</li> <li>Quarterly review of consumable usage and cost trends.</li> <li>Continuous improvement meetings with City representatives.</li> </ul>	<ul style="list-style-type: none"> <li>Documented performance consistency.</li> <li>Continuous service optimization.</li> <li>Transparent communication maintained.</li> </ul>

## Complimentary Tile & Grout Cleaning

**Service:** Restroom and Locker/Shower Floors ~2,541 SF

**Value:** \$1,550 (Included at No Cost to the City)

### Description

Elite Touch Cleaning included a complimentary deep tile and grout cleaning of restroom and locker/shower floors as part of the contract startup. This service will be performed using the **HydroForce SX-12 extraction system**, designed for interior environments to remove deep-set grime and restore grout color with minimal drying time.

### Our Process:

1. Inspect and test grout substrate.
2. Apply pre-cleaning chemical (3-5-minute dwell time)
3. Clean using HydroForce SX-12 overlapping passes.

The City will see a visible transformation in tile brightness and grout line restoration. This complimentary service demonstrates Elite Touch's commitment to delivering immediate, measurable quality improvements from the first day of operations.



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# Quality Control Plan (QCP) Summary

Elite Touch Cleaning maintains a structured Quality Control Plan (QCP) that ensures consistent performance, transparency, and rapid issue resolution. Our system combines trained supervision, technology-based reporting, and scheduled inspections to maintain the City's Municipal Office Building and Police Sub-Station at the highest standards of cleanliness and professionalism.

Guided by five core elements:

1. **Trained and supervised staff** who understand the expectations of a government facility.
2. **Technology-driven documentation** through Swept for real-time accountability.
3. **Routine inspections and reporting** to verify service quality.
4. **Prompt corrective action** to resolve deficiencies and maintain client satisfaction.

## 1. Supervision and Oversight

- **Daytime Oversight:** The Senior Day Porter serves as the on-site representative for City staff, maintaining communication and monitoring service quality throughout the day. This position provides continuity and immediate response to restroom, lobby, and service requests.
- **Nighttime Oversight:** A Working Night Supervisor leads the evening cleaning crew and conducts nightly walkthroughs, verifying completion of all task zones before shift close.
- **Area Manager Role:** The Area Manager performs weekly inspections, conducts staff evaluations, and reviews Swept data to identify trends, recurring issues, or improvement opportunities. The Area Manager also conducts monthly site meetings with the City's Contract Manager (Angela) or designated representative.

## 2. Inspection and Performance Tracking

All quality control activities are logged in Swept, our janitorial management platform. Swept provides:

- **GPS-based check-ins** verifying staff arrival and departure times.
- **Customized digital checklists** for every cleaning zone.
- **Photo documentation** of completed work and any reported issues.
- **Automatic reporting** of missed tasks, client notes, or corrective actions.

All inspection data is accessible to City staff upon request, providing a clear record of work performed, findings, and resolutions.

## 3. Corrective Action and Follow-Up

When an issue or deficiency is reported, the following process is followed:

1. The issue is logged in Swept with a description, photo (if applicable), and timestamp.

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2. The Account Manager is notified immediately and assigns responsibility for correction.
3. The deficiency is corrected within the same shift when possible or within 24 hours for non-urgent items.
4. A photo and note confirming completion are uploaded to the system.
5. The City receives a follow-up summary in the weekly performance report.

This process ensures accountability at every level and provides the City with complete visibility of service responses.

#### **4. Communication and Reporting**

Elite Touch maintains open communication channels with the City's Facilities Management and Contract Administration teams.

- **Daily:** The Senior Day Porter provides in-person feedback and logs any requests or concerns into Swept.
- **Weekly:** The Area Manager sends a digital summary of inspection findings, task completion, and issue resolution updates.
- **Monthly:** The City receives a full performance report summarizing cleaning metrics, consumable tracking, and improvement initiatives.

City staff will also have the option to log service requests or notes directly through Swept, ensuring immediate notification to both management and on-site staff.

#### **5. Continuous Improvement**

Elite Touch's quality control system is built for continuous review and improvement. Our management team uses inspection data to identify recurring trends, assess staff performance, and adjust training or schedules as needed. This process ensures long-term consistency and keeps service aligned with the City's evolving needs.

Quarterly meetings will be used to review:

- Inspection scores and feedback.
- Consumable usage reports.
- Staff performance and retraining plans.
- Opportunities for improvement or cost savings.

#### **Summary**

Through proactive supervision, real-time documentation, and transparent communication, Elite Touch Cleaning ensures the City of Charleston receives reliable, measurable, and continuously improving janitorial service. Our Swept-based quality control system provides complete visibility into daily operations while maintaining the flexibility to respond immediately to any need.

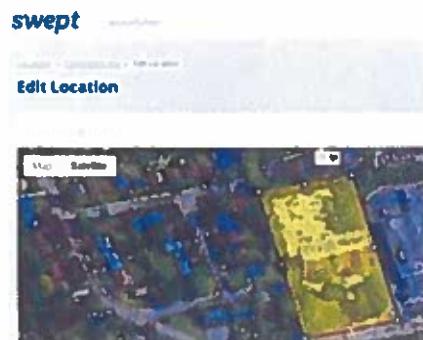
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## Swept Technology Platform

Our QCP is a living system that uses technology and supervisory oversight to guarantee results every day.

### Accountability through Swept:

All employees clock in via GPS geofence and follow digital task lists. Supervisors complete opening and closing walkthroughs and upload photos of critical areas. Angela and City leadership will receive monthly inspection reports with timestamped records.



### Inspection Program:

- Daily Supervisor Check of Restrooms and Common Areas
- Weekly Manager Inspection with Scorecard
- Monthly Joint Review with City Representative
- Random Spot Audits by Regional Leadership

**Deficiency Response:** Issues logged in Swept within 24 hours and assigned for correction. Repeat deficiencies trigger retraining. Completed actions are closed with before/after photos.



**Performance Reports:** Monthly summary of completed work, corrective actions, and consumable usage.

This structure meets the City's QCP requirement for documented monitoring and will ensure consistency throughout the contract term.

## Safety and Compliance Program

**Safety is non-negotiable.** Elite Touch Cleaning enforces a comprehensive safety and compliance program that meets OSHA, EPA, and City of Charleston requirements. All employees complete onboarding covering chemical handling, PPE use, ladder safety, bloodborne pathogen awareness, emergency response, and incident reporting.

Each facility maintains Safety Data Sheets (SDS) for every product on site, stored in clearly labeled binders in each janitor closet and reviewed quarterly. Safety meetings are conducted monthly to reinforce procedures and communicate any updates to products or policies.

Security and access protocols include badged entry, key control logs, and nightly lock-up verification performed by the Night Supervisor. Staff are trained to identify and report facility issues such as leaks, hazards, or safety concerns immediately to Angela and the City's designated Facilities Manager.

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Elite Touch maintains all required insurance coverage, including Commercial General Liability, Automobile, and Workers Compensation, in full compliance with the RFP. Certificates of insurance will be submitted to the City within five business days of award.

## Staffing Structure

Elite Touch Cleaning's staffing model is structured to maintain direct accountability, visible supervision, and consistent performance across all shifts. Each position has a defined role to ensure service quality, communication, and reliability throughout the City's facilities.

The **Senior Day Porter** will serve as the City's on-site representative during business hours, managing restroom checks, touch-ups, consumable restocking, and special requests. This position also acts as the communication link between City staff and Elite Touch management, ensuring prompt attention to any service needs.

The **Night Supervisor** will oversee the evening operations, guiding the cleaning crew, confirming task completion, and performing nightly inspections before lock-up. This supervisor also verifies security procedures and ensures the facility is secured properly at the end of each shift.

The **Night Cleaning Crew** will consist of two trained team members responsible for all nightly cleaning tasks including floor care, restroom sanitation, and detailed office cleaning. Their work will follow a structured task list verified through the Swept platform to ensure nothing is missed.

Oversight will be supported by an **Area Manager** who conducts weekly inspections, monitors Swept performance data, and meets monthly with the City's Contract Manager to review results and any improvement actions.

Finally, the **Director of Operations** provides executive oversight into safety compliance, staffing, and client relations to ensure long-term contract success and responsive communication with City leadership.

This organizational approach combines a hands-on supervision model with proactive management oversight, ensuring that the City of Charleston receives reliable, transparent, and consistent janitorial service throughout the duration of the contract.

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**Senior Day Porter (8a-4p)**  
Deliver Spec and Support Angela  
2 George Street

**Night Supervisor (5p-10p)**  
Working Manager  
2 George Street

**(3) Night Cleaners (5p-10p)**  
Recurring Cleaning  
2 George Street

## Staff Development and Retention

Elite Touch operates on the principle that quality service comes from stable, well-trained teams. We pay above-industry wages and promote from within, allowing cleaners to advance into lead and supervisor roles. Every employee completes a two-day training program covering cleaning methods, customer service, and equipment use.

Supervisors receive monthly development sessions in floor care, leadership, and safety management. All staff undergo retraining every 90 days on chemical use, inspection standards, and quality control procedures.

Attendance is tracked daily through Swept, validated by GPS check-ins and supervisor signoffs. Cross-trained backup staff are maintained for coverage to ensure no service interruption due to absences or emergencies.

Our goal is to keep the same core cleaning team assigned to the City of Charleston throughout the contract to provide familiar, consistent service and maintain continuity of care.

## Implementation Plan and Launch Schedule

Elite Touch is prepared to begin services within five business days of contract award under our Rapid Launch Plan.

DAY / PHASE	ACTION
DAYS 1-2	Finalize insurance and compliance documentation, complete background checks, deliver and stage equipment and chemicals.
DAYS 3-4	Conduct staff orientation, issue uniforms, and complete Swept training. Perform initial deep clean and restroom reset.
DAY 5	Launch full schedule with Senior Day Porter, Night Supervisor, and cleaning crew.
END OF WEEK 1	Baseline detail completed; provide photo documentation and Quality Control Plan (QCP) report to Angela.

During the first 60 days, Elite Touch will hold weekly check-ins with City representatives to review service performance, ensure expectations are met, and confirm satisfaction before transitioning to a standard monthly review schedule.

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## MWBE Participation and Reporting

Elite Touch Cleaning is a certified Minority Business Enterprise (MBE) and Small Business Enterprise (SBE). All janitorial services under this contract will be self-performed by our company, and Affidavit C will be submitted as official documentation.

We also source consumables and paper products from MWBE-certified suppliers whenever available and will report all MWBE-related spend quarterly to the City. If specialty floor care or maintenance support is required, Elite Touch will prioritize local, certified MWBE partners to maximize inclusion and community benefit.

## Relevant Experience

Elite Touch Cleaning has extensive experience managing municipal, public, and professional office environments throughout the Carolinas. Our portfolio includes large-scale government, corporate, and high-traffic public facilities that require dependable service, trained personnel, and hands-on supervision.

**Liberty Center – Charleston, SC** – Five-day-per-week janitorial service for a mixed-use Class A office facility managed by Lat Purser & Associates. Scope included office suites, restrooms, and shared common areas with full day porter coverage and consumable supply management. The service model closely mirrors the City's Municipal Office Building requirements in both scale and scheduling and is located less than half a mile from the MOB site, demonstrating direct local capability and familiarity with Charleston operations.

**Charlotte Airport** – On demand cleaning and supplemental staff support for secure terminal and administrative areas. Focused on high-security access and adherence to OSHA and TSA safety requirements.

**Schneider National – Columbia Operations Hub** – 7-day janitorial program supporting 24/7 logistics operations with locker rooms, showers, and breakrooms. Maintained continuous service coverage and on-site supervision to meet DOT facility standards.

**City of Charlotte Transportation Center (CTC)** – 24/7 janitorial and exterior maintenance for a high-traffic public transit hub. Scope included cleaning of concourses, restrooms, offices, and exterior areas with daily inspections and reporting to city officials. Results: 75% reduction in complaints within 90 days and consistent inspection scores above 90%.

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## References

Trust is built through consistent performance, clear communication, and accountability. The following professional references can speak to our reliability, responsiveness, and quality of service across diverse facility types and operating environments.

### Large Commercial Office

*Julia Pererva*  
Sr. Property Manager  
Lat Purser & Associates, Inc.  
151 Meeting Street, Charleston, SC 29401  
91,000 SF Office Cleaning  
[Julia.Pererva@latpurser.com](mailto:Julia.Pererva@latpurser.com)  
(Requested email only)



### Large Facility Care

*Charise Jenkins*  
Onsite Manager – Charlotte Airport  
ABM  
10420 Harris Oaks Blvd Ste R Charlotte, NC 28269  
704-919-6743  
[Charise.jenkins@abm.com](mailto:Charise.jenkins@abm.com)



### Mixed-Use Facilities

*Sheila Proctor*  
Senior Association Manager  
MPV Properties  
2400 South Blvd, #300 Charlotte, NC 28203  
704-367-5023  
[sproctor@mpvre.com](mailto:sproctor@mpvre.com)



These clients can speak about our reliability, communication, and consistent performance in government and multi-tenant environments.

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## COMBINED SERVICES AGREEMENT

This Services Agreement (the "Agreement") is made and entered into by and between Elite Touch Cleaning Services, Inc. ("ETCS") and City of Charleston (the "Client") and is subject to the following provisions:

### RECITALS

WHEREAS, ETCS is in the business of providing cleaning and janitorial services to and for the benefit of its customers; and

WHEREAS, the Client wishes to retain ETCS to provide the cleaning and janitorial services as stated in the Cleaning Specifications sheet attached to this Agreement as Exhibit B (the "Services").

NOW, THEREFORE, for and in consideration of the above premises, the mutual covenants set forth below in this Agreement, and other good and valuable consideration, the receipt and sufficiency of which are hereby acknowledged, the parties agree as follows:

1. **Services.** ETCS will provide the Services to Client at the location listed on Exhibit A to this Agreement (the "Site"). Additional services may be performed by ETCS upon the written request of the Client, and such Services will be subject to additional charges.
2. **Term of Agreement.**
  - a. **Recurring Services:** The term of recurring Services shall be for a 1-year period, subject to renewal for additional 12-month periods if both parties are satisfied with the Services provided. Either party may terminate recurring Services upon thirty (30) days' prior written notice. If the Client terminates without such notice, ETCS shall be excused from further performance of Services, and the Client shall pay an amount representing a full month's Services.
  - b. **One-Time Services:** The term for one-time Services shall be limited to the specific service date(s) listed in Exhibit A.
3. **Payment / Payment Terms.** Client shall pay ETCS the amount set forth in Exhibit A (the "Price"). Invoices for recurring Services will be issued on or about the 1st day of each month. Payment is due by the 25th of that month. Invoices for one-time Services shall be issued in advance or upon completion, as specified in Exhibit A. If payment is not received by the 10th day of the following month for which payment is due, ETCS may suspend Services until payment is received or may immediately terminate this Agreement. All accounts which are thirty (30) days past due are subject to late charges equal to the lesser of two percent (2%) per month or the maximum permitted by law. If ETCS engages an outside collection agency or attorney to collect amounts due, the Client will be responsible for all related costs.
4. **Work Schedule.**
  - a. **For recurring Services,** janitorial work will be provided as scheduled in Exhibit A, generally Monday through Friday, excluding the following holidays: New Year's Day, Memorial Day, Independence Day, Labor Day, Thanksgiving Day, Christmas Day, and Juneteenth.
  - b. **For one-time Services,** work shall be performed on the agreed upon date(s) as listed in Exhibit A.
5. **Uniforms.** All personnel performing the Services will always wear a cobbler apron or shirt with a company logo while performing the Services.
6. **Chemicals.** All cleaning chemicals required to perform the Services will be provided by ETCS. The Client is responsible for providing trash can liners, hand soap, and all paper products, unless otherwise specified in Exhibit A.

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7. **Equipment.** ETCS will provide all equipment necessary to perform the Services.
8. **Insurance.** ETCS will carry appropriate insurance and shall provide a Certificate of Insurance to the Client upon request.
9. **Non-Solicitation of Personnel.** Both parties agree that neither will induce or attempt to induce any employee of the other party to terminate his/her employment with such party while this Agreement is in effect and for one (1) year following termination of this Agreement.
10. **Entire Agreement.** This Agreement, together with all exhibits and schedules hereto, constitutes the entire agreement between the parties with respect to the Services, and supersedes all prior agreements or understandings, whether written or oral.
11. **Counterparts.** This Agreement, and any amendments thereto, may be executed in counterparts, each of which shall constitute an original document, but which together shall constitute one and the same instrument.
12. **Headings.** The section headings contained in this Agreement are for convenience only and shall not affect the interpretation of this Agreement.
13. **Governing Law.** This Agreement shall be governed by and construed in accordance with the laws of the State of North Carolina, including conflicts of laws principles thereof.
14. **Amendment.** This Agreement may be amended only in writing and executed by both parties.
15. **Exhibits/Schedules.** All exhibits and schedules attached to this Agreement are incorporated herein by this reference. References to "Agreement" shall mean this Agreement together with all such exhibits and schedules.
16. **Waiver.** The waiver by either party of any default shall not be construed as a waiver of future defaults under this Agreement.
17. **Effective Date.** This Agreement commences on \_\_\_\_\_ (the "Effective Date").
18. **Acceptance.** By signing below, the parties accept the terms and conditions of this Agreement.

Elite Touch Cleaning Services, Inc.

City of Charleston

By: Kyle Fisher

By: \_\_\_\_\_

Name: Kyle Fisher

Name: Robin Barrett-Robinson,

Title: Director of Sales

Title: Senior Buyer

Date: 10/23/25

Date:

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## Exhibit A- Price Summary

Facility Component	Square Footage
Municipal Office Building (Total)	96,903 SF
MOB (Less Police Sub-Station)	92,203 SF
Police Sub-Station (Estimated)	4,700 SF
Night Cleaning Standard Rate	\$0.0755 / SF

### Monthly Cost

**Day Working Supervisor Recommendation:** A separate daytime working supervisor we feel is **not required** for this building size and layout. Oversight can be managed effectively by the higher-paid day porter and the night supervisor.  
This structure provides full accountability without duplicating management labor.

Position / Cost Component	Monthly Cost	Annual Cost	Notes
Senior Day Porter	\$5,266	\$63,192	8 hrs/day, 5 days/week. Higher base rate ensures quality and consistency.
MOB Standard Night Cleaning Crew	\$6,961	\$83,532	Based on 92,203 SF at 5x/week. 3-person team (1 supervisor + 2 cleaners) @ 4,600 SF/hour.
Police Sub-Station Specialized Crew	\$940	\$11,280	4,700 SF serviced 3x/week.
Consumables (Included)	\$1,463	\$17,556	Estimated at 20% of contract value (soap, paper, tissue, liners, sanitizer). Review at 90 days and adjust as needed.
<b>Total Estimated Cost</b>	<b>\$14,630</b>	<b>\$175,560</b>	Includes all labor, supervision, consumables, and equipment. Reassess consumables quarterly.

### Notes

- All consumables are included per City of Charleston RFP 25-P022R requirements.
- Require consumable amounts reviewed after 90 days to ensure accuracy.
- **Complimentary Tile & Grout Service:** Provided during startup at no cost to the City, demonstrating Elite Touch's investment in long-term facility care.

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## Specialty Services

To ensure transparency and flexibility, Elite Touch provides **unit-based pricing** that allows the City to plan frequency and coverage as needed for each area of the Municipal Office Building.

Service Type	Recommended Frequency	Unit Rate (\$/SF)	Notes
Strip & Wax – VCT / Hard Surface Floors	Annually	\$1.20	Includes 3 coats of finish; biannual available if required
Carpet Extraction	Annually or Biannually	\$0.20	Pricing depends on soil level and carpet density
Tile & Grout Deep Cleaning (Optional)	As Needed	Complimentary Initial Service	One-time startup service for restroom and locker room floors

### Example and Efficiency Impact

If the 96,903 SF Municipal Office Building received carpet extraction twice per year, the total annual cost would be:

$\$0.20 \times 96,903 \text{ SF} \times 2 = \$38,761$  annually. For a project of this scale, efficiencies from consolidated scheduling and reduced mobilization would lower total cost by 7-12%.

### Implementation Flexibility

Not every area needs equal frequency. High-traffic zones may warrant more frequent cleaning, while office and meeting spaces may need less. Services can be scheduled by floor or area to ensure the City only pays for work that adds measurable value. **\$500 minimum per visit**

## Operational Adjustments and Savings

Item	Annual Value	Notes
Savings from Eliminating 2 <sup>nd</sup> Day porter role	\$56,564	Cost avoided by reallocating the day porter role
Complimentary Tile & Grout Floor Cleaning	\$1,550	Value-added service performed at no cost to the City, funded through operational efficiency savings.
Elite Touch Equipment Investment	\$4,416	Annual investment in HEPA vacuums, buffers, and other specialized cleaning tools to maintain City standards.
<b>Total Combined Savings / Value Delivered</b>	<b>\$62,530</b>	

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## Exhibit B – Scope of Work

During review of the City's provided cleaning specification, I identified several tasks that appeared to reflect service expectations from the prior Gaillard Center RFP rather than the Municipal Office Building. Based on my site visit and understanding of the MOB's use, layout, and traffic patterns, these specifications exceeded what is typical for a Class B government office environment.

I've realigned the frequencies and scope to reflect a standardized office cleaning specification, consistent with industry benchmarks and practical needs for this facility. These adjustments maintain quality and appearance while removing unnecessary high-frequency or specialty items, resulting in a more efficient service plan that will save the City substantial cost without compromising standards or compliance.

### Municipal Office Building – 96,903 SF

2 George Street, Charleston, SC 29401

5x/week schedule (Mon-Fri)

Red  Incorrect Frequency

Green  Recommended

#### Offices & General Areas (Including Lobby)

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Empty waste cans, maintain unsoiled liners	X					
Damp wipe coffee rings, desks, furniture (as needed)	X					
Dust exposed areas of furniture			X			
Clean and sanitize drinking fountains	X					
Low dust baseboards, chair rungs, table legs		X	X			1 floor completed per month on rotation
High dust surfaces (over 72")				X		
Low dust (36") – windowsills, ledges, frames		X				
Spot clean walls and partitions	X					
Spot clean glass doors & lobby partitions	X					
Clean entire glass doors inside/out		X				
Dust blinds				X	X	Recommend biannual
Remove dust & cobwebs from ceiling		X				
Dust mop or vacuum door traffic areas	X					
Wall-to-wall vacuum or mop hard floors			X			
Spot clean carpets and furniture	X					
Spot clean counters & sinks, restock paper towels	X					

#### Hard Floors

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Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Strip and refinish VCT floors			X	X	X	High-traffic areas may require biannual 1 floor completed per month rotation
Buff VCT and composite floors (spray buff)	X		X			1 floor per month rotation
Machine scrub restroom floors	X		X			1 floor per month rotation
Lobby maintenance / floor care					X	

#### Windows

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Spot clean interior office windows			X			
Clean exterior ground-level windows					X	Limited to ground floor per agreement

#### Restrooms

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Clean, disinfect, and polish fixtures (toilets, urinals, sinks)	X					
Clean and polish mirrors	X					
Empty and sanitize trash containers	X					
Spot clean walls, doors, and partitions	X					
Refill dispensers (soap, paper, towels, liners)	X					
Dust air vents and ducts			X			

#### General Maintenance

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Sweep and mop high-traffic areas	X					
Sweeping/mopping of all hard floors (wall-to-wall)			X			1 floor per week rotation
Vacuum carpeted high-traffic areas	X					
Vacuum carpeted areas (wall-to-wall)			X			1 floor per week rotation
Flush and sanitize floor drains			X			
Maintain janitor closets and storage	X			X		New equipment provided to save time
Clean and inspect janitorial equipment				X		
Observe building security & lighting	X					
Report on irregularities or maintenance issues	X					

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Communication and reporting via Swept	X	Recommend replacing logbook with technology
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#### Break Rooms / Kitchenette

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Clean and sanitize tables, chairs, and surfaces	X					
Clean sinks and countertops	X					
Clean microwaves exterior	X					
Dust ledges, light fixtures, and vents		X	X			
Refill dispensers and supplies	X					

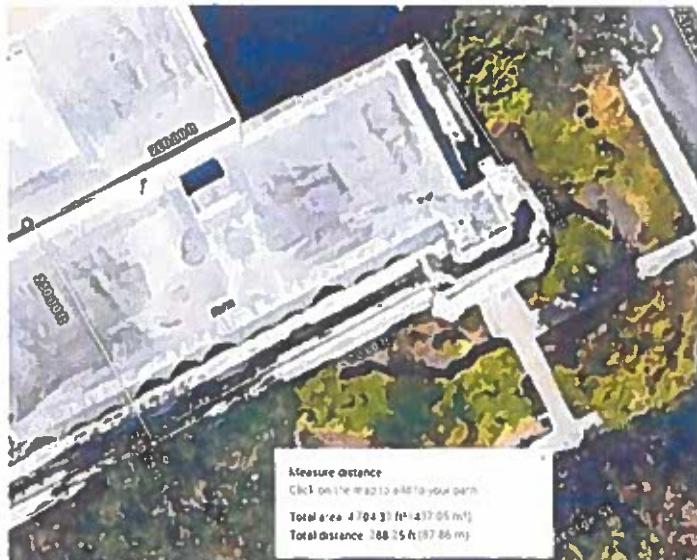
#### Miscellaneous / Building Areas

Service	Daily	Weekly	Monthly	BiAnnual	Annually	Notes
Inspect and police stairwells	X	X				This is a weekly action, but day porter monitors daily
Sweep/vacuum/mop stairwells		X				
Clean elevator walls, buttons, floors	X	X				
Vacuum elevator tracks	X					Spot checked daily
Polish elevator tracks	X	X				

#### Other / As Needed

Service	Frequency
Light restroom restocking (public areas)	Day Porter
Policing trash pickup	Day Porter
Policing of spillage removal	Day Porter
Routing wastebasket maintenance	Day Porter

#### Approach to Estimating Police Sub-Station Square Footage



7716 England St. Ste. B Charlotte, NC 28273  
O. 704-266-0623 F 704-733-9337  
EliteTouchCleaning.com



## CERTIFICATE OF LIABILITY INSURANCE

TEST-1 OP ID: MM

DATE (MM/DD/YYYY)  
XXXX

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 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 sample	CONTACT	
	PHONE 404-555-1234	FAX 404-555-1234
INSURED(1) APPROVING COVERAGE		RAIC #
INSURED A CARRIER		
INSURED B		
INSURED C		
INSURED D		
INSURED E		
INSURED 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.					
NAME & LTR	TYPE OF INSURANCE	ISSUE DATE MM/DD/YY	POLICY NUMBER	PERIOD OF INSURANCE MM/DD/YY - MM/DD/YY	LIMITS
A	GENERAL LIABILITY				
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR		<input checked="" type="checkbox"/> POLICY #	01/01/18 - 01/01/19	<input checked="" type="checkbox"/> EACH OCCURRENCE \$ 1,000,000 \$ 100,000 \$ 5,000 \$ 1,000,000 \$ 2,000,000 \$ 2,000,000 \$ 0
A	AUTOMOBILE LIABILITY				
	<input checked="" type="checkbox"/> ANY AUTO ALL OWNED AUTOS <input checked="" type="checkbox"/> Hired AUTOS	<input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS	<input checked="" type="checkbox"/> POLICY #		<input checked="" type="checkbox"/> EACH OCCURRENCE \$ 0 \$ 0 \$ 0 \$ 0 \$ 0 \$ 0 \$ 0
A	UMBRELLA LIAB	OCCUR			
	EXCESS LIAB	CLAIMS-MADE	<input checked="" type="checkbox"/> POLICY #		<input checked="" type="checkbox"/> EACH OCCURRENCE \$ 0 \$ 0 \$ 0
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY				
	ANY PROPRIETOR/PARTNER/EXECUTIVE OPCIONAL/EXCLUDED Excluded from WFC If not covered, other DESCRIPTION OF OPERATIONS BEING	<input checked="" type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A	<input checked="" type="checkbox"/> POLICY #	01/01/18 - 01/01/19	<input checked="" type="checkbox"/> INC. STATUTORY LIMITS \$ 1,000,000 \$ 1,000,000 \$ 1,000,000

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

Certificate holder is additional insured under general liability policy with respect to ongoing and completed operations on a primary and non-contributory basis as required by written contract or agreement. General Liability policy includes a Waiver of Subrogation in favor of the Certificate holder when required by written contract or agreement. All policies are endorsed with a 30 Day Notice of Cancellation in favor of the certificate holder.

CERTIFICATE HOLDER		CANCELLATION	
ELITE TOUCH CLEANING SERVICES, INC 7716 England Street, Suite B Charlotte, NC 28273		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	

ACORD 25 (2010/05)

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ORIGINAL

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O 704-266-0623 F 704-733-9337  
EliteTouchCleaning.com

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

**Request for Taxpayer  
 Identification Number and Certification**

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

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

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

<p>1 Name of entity/individual: An entry is required. For a sole proprietor or disregarded entity, enter the owner's name on line 1, and enter the business/disregarded entity's name on line 2.)  <b>ELITE TOUCH CLEANING SERVICES, INC</b></p>	
<p>2 Business name/disregarded entity name, if different from above</p>	
<p>3a Check the appropriate box for federal tax classification of the entity/individual whose name is entered on line 1. Check only one of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor   <input type="checkbox"/> C corporation   <input checked="" type="checkbox"/> S corporation   <input type="checkbox"/> Partnership   <input type="checkbox"/> Trust/estate  <input type="checkbox"/> LLC Enter the tax classification (C = C corporation, S = S corporation, P = Partnership)    Note: Check the "LLC" box above and, in the entry space, enter the appropriate code (C, S, or P) for the tax classification of the LLC, unless it is a disregarded entity. A disregarded entity should instead check the appropriate box for the tax classification of its owner  <input type="checkbox"/> Other (see instructions)</p>	
<p>3b If on line 3a you checked "Partnership" or "Trust/estate," or checked "LLC" and entered "P" as its tax classification, and you are providing this form to a partnership, trust, or estate in which you have an ownership interest, check this box if you have any foreign partners, owners, or beneficiaries. See <i>Instructions</i> <input type="checkbox"/></p>	
<p>4 Exemptions (codes apply only to certain entities, not individuals; see <i>Instructions</i> on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from Foreign Account Tax Compliance Act (FATCA) reporting code (if any) _____</p> <p>(Applies to accounts maintained outside the United States.)</p>	
<p>5 Address (number, street, and apt. or suite no.). See <i>Instructions</i>.    P.O Box 241982</p>	<p>Requester's name and address (optional)</p>
<p>6 City, state, and ZIP code    Charlotte, NC 28224</p>	
<p>7 List account number(s) here (optional)</p>	

**Part I Taxpayer Identification Number (TIN)**

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

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

Social security number								

Employer identification number								
2	7		2	5	0	8	0	0

**Part II Certification**

Under penalties of perjury, I certify that

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

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

Sign Here	Signature of U.S. person	<i>Marcela Marulanda</i>	Date	7/01/25
-----------	--------------------------	--------------------------	------	---------

**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).

**What's New**

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

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

**Purpose of Form**

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

**ORIGINAL**

Cat No. 10231X

Form W-9 (Rev. 3-2024)

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 E IntelTouchCleaning.com



October 23, 2025  
RFP # 25-P022R

Janitorial Services for the City Municipal Office Building

## Cost Summary

Facility Component	Square Footage
Municipal Office Building (Total)	96,903 SF
MOB (Less Police Sub-Station)	92,203 SF
Police Sub-Station (Estimated)	4,700 SF
Night Cleaning Standard Rate	\$0.0755 / SF

**Day Working Supervisor Recommendation:** A separate daytime working supervisor we feel is **not required** for this building size and layout. Oversight can be managed effectively by the higher-paid day porter and the night supervisor.

This structure provides full accountability without duplicating management labor.

Position / Cost Component	Monthly Cost	Annual Cost	Notes
Senior Day Porter	\$5,266	\$63,192	8 hrs/day, 5 days/week. Higher base rate ensures quality and consistency.
MOB Standard Night Cleaning Crew	\$6,961	\$83,532	Based on 92,203 SF at 5x/week. 3-person team (1 supervisor + 2 cleaners) @ 4,600 SF/hour.
Police Sub-Station Specialized Crew	\$940	\$11,280	4,700 SF serviced 3x/week.
Consumables (Included)	\$1,463	\$17,556	Estimated at 20% of contract value (soap, paper, tissue, liners, sanitizer). Review at 90 days and adjust as needed.
<b>Total Estimated Cost</b>	<b>\$14,630</b>	<b>\$175,560</b>	Includes all labor, supervision, consumables, and equipment. Reassess consumables quarterly.

- All consumables are included per City of Charleston RFP 25-P022R requirements.
- Require consumable amounts reviewed after 90 days to ensure accuracy.
- **Complimentary Tile & Grout Service:** Provided during startup at no cost to the City, demonstrating Elite Touch's investment in long-term facility care.

## Specialty Services

To ensure transparency and flexibility, Elite Touch provides **unit-based pricing** that allows the City to plan frequency and coverage as needed for each area of the Municipal Office Building.

Service Type	Recommended Frequency	Unit Rate (\$/SF)	Notes
Strip & Wax – VCT / Hard Surface Floors	Annually	\$1.20	Includes 3 coats of finish; biannual available if required
Carpet Extraction	Annually or Biannually	\$0.20	Pricing depends on soil level and carpet density
Tile & Grout Deep Cleaning (Optional)	As Needed	Complimentary Initial Service	One-time startup service for restroom and locker room floors

### Example and Efficiency Impact

If the 96,903 SF Municipal Office Building received carpet extraction twice per year, the total annual cost would be:

$\$0.20 \times 96,903 \text{ SF} \times 2 = \$38,761$  annually. For a project of this scale, efficiencies from consolidated scheduling and reduced mobilization would lower total cost by 7–12%.

### Implementation Flexibility

Not every area needs equal frequency. High-traffic zones may warrant more frequent cleaning, while office and meeting spaces may need less. Services can be scheduled by floor or area to ensure the City only pays for work that adds measurable value. **\$500 minimum per visit**

## Operational Adjustments and Savings

Item	Annual Value	Notes
Savings from Eliminating 2 <sup>nd</sup> Day porter role	\$56,564	Cost avoided by reallocating the day porter role
Complimentary Tile & Grout Floor Cleaning	\$1,550	Value-added service performed at no cost to the City, funded through operational efficiency savings.
Elite Touch Equipment Investment	\$4,416	Annual investment in HEPA vacuums, buffers, and other specialized cleaning tools to maintain City standards.
<b>Total Combined Savings / Value Delivered</b>	<b>\$62,530</b>	

## COMMITTEE / COUNCIL AGENDA

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Chief Chito Walker	DEPARTMENT	Police
SUBJECT:	COMPREHENSIVE DATA ANALYTICS SYSTEM		
REQUEST:	Approval to establish a contract for a Comprehensive Data Analytics System with Kellton Tech Solutions, Inc., 5600 Tennyson Parkway, Plano, TX 75024. Solicitation #24-P028R		
COMMITTEE OF COUNCIL:			DATE: January 13, 2024

COORDINATION: This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	Signature of Individual Contacted	Attachment
Corporate Counsel	<input type="checkbox"/>	<input type="checkbox"/>	<i>Eric Brumbaugh</i>	<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>	<i>Chito Walker</i>	<input type="checkbox"/>
Department Head	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>William S. Cogswell</i>	<input type="checkbox"/>
Procurement Director	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Theresa Day</i>	<input type="checkbox"/>

FUNDING: Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: Community Oriented Policing Account #: Non-Capital Professional & Contractual Services

Balance in Account \$327,000 Amount needed for this item \$327,000.00

Does this document need to be recorded at the RMC's Office? Yes  No

NEED: Identify any critical time constraint(s).

CFO's Signature: Matthew, Deputy CFO for Amy Walker, CFO

FISCAL IMPACT: This purchase will be funded by the 2023 Smart Policing Initiative Grant (GR-00098).

Mayor's Signature: William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.

**Comprehensive Data Analytics System  
Vendor Rankings  
24-P028R**

**Date: August 5, 2025**

**Buyer: Robin B. Robinson  
Procurement Director: Gary Cooper**

<b>Ranking of Proposals (#1 = lowest score)</b>		
1.	<b>Kellton</b>	<b>3</b>
2.	<b>Intellectyx</b>	<b>6</b>

# Comprehensive Data Analytics System

Solicitation# 24-P028R

December 12, 2024

Buyer: Robin B. Robinson

Procurement Director: Gary Cooper

## Ranking of Proposals (#1 = highest score)

1.	Kellton Tech Solutions	237
2.	Intellectyx	236
3.	O2 Consulting Services	219
4.	ScienceSoft USA	210
5.	Consultadd	210
6.	Estrada Consulting	208
7.	BuzzClan	207
8.	Ark Infotech	203
9.	Midas Education	200
10.	IPC Global InProcess Consulting	199
11.	ThoughtFocus	195
12.	Peregrine Tech	194
13.	Tangible Analytics Consulting	194
14.	Quengine LLC DBA Inzata	187
15.	DyLytics	185
16.	ForceMetrics	183
17.	Blue Key Consulting	182
18.	Maseke	168
19.	California Creative Solutions	166

STATE OF SOUTH CAROLINA      )  
                                    )  
COUNTY OF CHARLESTON      )

**AGREEMENT BETWEEN THE CITY OF CHARLESTON  
AND KELLTON TECH SOLUTIONS FOR  
COMPREHENSIVE DATA ANALYTICS SYSTEM**

THIS AGREEMENT is entered into this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_ between the City of Charleston, a municipal corporation organized under the laws of the State of South Carolina (hereinafter referred to as "the City"), and Kellton Tech Solutions (hereinafter referred to as the "Contractor").

NOW, THEREFORE, for and in consideration of the mutual promises, covenants and conditions stated herein, the parties agree as follows:

**§1. SCOPE OF SERVICES**

The parties agree that the Contractor shall furnish the Comprehensive Data Analytics System in accordance with Solicitation #24-P028R. All attachments and exhibits, including Exhibits A, B, C, D, E, F, and G listed below, shall be incorporated herein:

Exhibit A:	Solicitation #24-P028R (the "Request for Proposal")
Exhibit B:	Addenda to Solicitation
Exhibit C:	Insurance Requirements
Exhibit D:	Contractor's Proposal
Exhibit E:	Cost Proposal
Exhibit F:	Revised Proposal for On-Premises Solution
Exhibit G:	Project Payment Structure

In the event of any conflict between the contract documents, the following order of control shall prevail: the Agreement between City and Contractor, Exhibit A, Exhibit B, Exhibit C, Exhibit D, Exhibit E, Exhibit F, and Exhibit G.

1. The Contractor shall safely, diligently and in a professional and timely manner perform, with its own equipment and assets, and provide goods and/or services as described in Exhibits A, B, D, E, F, and G as approved by the City in fulfilling its obligations as set forth in this Agreement. Unless modified in writing by the parties hereto, the duties of the Contractor shall not be construed to exceed the provision of the goods and/or services pertaining to this Agreement.
2. The Contractor shall provide the services as set forth and described in Exhibits A, B, D, E, F, and G as approved by the City to this Agreement and specifically detailed in any Purchase/Work Orders, if any, as may be issued from time-to-time by the City.
3. The Contractor hereby warrants and represents to the City that it possesses all necessary licenses to perform the work as set forth in this Agreement, carries the requisite insurance policies as set forth in Exhibit C, and is competent and able to provide professional and high quality goods and/or services to the City in accordance with this Agreement.

4. The Contractor shall bill only for work according to Exhibits A, B, D, E, F, and G as approved by the City and the proposed pricing and pricing structure for such work as shown in Exhibits F and G. No additional work shall be performed unless requested by the City Official authorized for this project. If the City requests any additional work from the Contractor, the parties shall negotiate any possible additional costs related thereto prior to Contractor's performance of such requested additional work.

## **§2. CONTRACT TERM**

The initial term of this Agreement shall be for a period of one (1) year from the date of execution. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

## **§3. COMPENSATION AND PAYMENT TERMS**

This Agreement authorizes payments not to exceed \$327,000.00 (Three Hundred Twenty-Seven Thousand Dollars and Zero Cents) per year to be made in accordance with the Request for Proposal, Addenda and the Contractor(s)' Proposal Response and Cost Proposal, Revised Proposal for On-Premises Solution, and Project Payment Structure (Exhibits A, B, D, E, F, and G). Payment terms shall be Net 30 days after receipt of an approved invoice by the City. Payment to the Contractor shall be made after services have been rendered. The Contractor must submit an original invoice for each payment request to the City in care of Accounts Payable whose mailing address is PO Box 853, Charleston, SC 29402, and whose physical office is located at 116 Meeting Street, Charleston, SC 29401. Faxed and/or copied invoices from the Contractor to the City shall not be accepted. Rates shall not increase during the term of this Agreement or any agreement extensions. If the Contractor requests a price increase, it shall be in accordance with the US Department of Labor/Bureau of Labor Statistics/Consumer Price Indexes, and shall only be requested ninety (90) days prior to the anniversary date of the Agreement. The City shall have the sole discretion to honor or reject the Contractor's request for a price increase.

## **§4. WARRANTIES AND REPRESENTATIONS**

- A. The Contractor hereby represents and acknowledges that it is a licensed, bonded contractor capable of performing the work hereunder.
- B. All equipment, materials, and supplies incorporated in the work covered by this Agreement and provided by the Contractor are to be of the highest quality for their intended purpose. When requested, the Contractor shall furnish to the City for approval the name of the manufacturer, the model number, and other identifying data and information regarding the performance, capacity, nature and rating of the machinery, mechanical, and other equipment which the Contractor is required to incorporate into the project. Machinery, equipment, material and supplies used without the required prior approval of the City shall be at the risk of subsequent rejection by the City at no cost to the City.
- C. The Contractor warrants and represents that its staff is knowledgeable about, and experienced in providing the materials specified in the work required in accordance with this Agreement and warrants that it will use its best skill and attention to provide the above described work and materials in a professional and timely manner.

## **§5. SUBCONTRACTORS**

- A. If any Subcontractor shall be used for this project, the Contractor shall provide to the City's Director of Procurement a list of names of any of the intended Subcontractors, the Subcontractor's applicable license number(s), and a description of the work to be done by each subcontractor, if requested by the City.
- B. The Contractor shall not substitute any Subcontractor without the prior written consent of the City's Director of Procurement.
- C. The Contractor shall be responsible for all services performed by a Subcontractor. Responsibilities include, but are not limited to, compliance with any applicable licensing and insurance regulations.
- D. If at any time the City's Director of Procurement determines that any Subcontractor is incompetent or undesirable, he shall notify the Contractor accordingly, and the Contractor shall take immediate steps for the termination/cancellation of the Subcontractor from any further work on the project. In addition, the Contractor shall take the necessary steps to replace such terminated Subcontractor from work on the project with a Subcontractor who is acceptable to the City.
- E. Nothing contained in any contract resulting from this Agreement shall create any contractual relationship between any Subcontractor and the City of Charleston.

## **§6. INDEMNIFICATION**

The Contractor hereby expressly agrees to indemnify and hold the City harmless against any and all expenses and liabilities arising out of the performance or default of this Agreement as follows:

The Contractor expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or Subcontractors or any person, firm, or corporation directly or indirectly employed by the Contractor, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the City and its employees or by any member of the public, to indemnify and save the City and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs and expenses arising out of the performance or default of this Agreement. Such costs shall include defense, settlement, court costs and reasonable attorneys' fees incurred by the City and its employees. This promise by the Contractor to indemnify the City shall include bodily injuries or death occurring to the City's officers, officials, employees and any person directly or indirectly employed by the City, the City's employees, the employees of any other independent contractors including Subcontractors, or to any member of the public. When the City submits notice, Contractor shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this indemnity obligation. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

## **§7. INSURANCE REQUIREMENTS**

The Contractor shall comply with all insurance requirements which are set forth in Exhibit C.

## **§8. GRATUITIES AND KICKBACKS**

***Gratuities.*** It shall be unethical and a violation of this Agreement by the Contractor for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement of a contract or subcontract, or to any solicitation or bid therefore.

***Kickbacks.*** It shall be unethical and a violation of this Agreement by the Contractor for any payment, gratuity, or offer of employment to be made by or on behalf of a Subcontractor under a contract to the Contractor, or to hire any Subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

## **§9. TERMINATION**

***For Convenience:*** The City reserves the right to terminate the contract with the Contractor when it is in the best interest of the City, including, but not limited to non-appropriation of funds. If the contract is so terminated, the City shall provide the Contractor with a minimum of thirty (30) days written notice and shall compensate Contractor for all necessary and reasonable direct costs of performing the services actually accomplished as of the date of termination. No other costs shall be allowed for a termination for convenience. No damages shall be allowed for a termination for convenience.

***For Default:*** If the Contractor fails to comply with the terms of the contract the City shall notify the Contractor in writing of the specifics regarding such noncompliance. If the Contractor fails to begin to cure the noncompliance within five (5) days after the notice, the City may terminate the contract by written notice to the Contractor with a minimum of thirty (30) days thereafter and Contractor shall only be compensated for services actually completed prior to termination, contractor shall not be entitled to any costs or damages resulting from a termination under this section.

## **§10. ASSIGNMENT**

The Contractor shall not assign in whole or in part any part of this Agreement without the prior written consent of the City. The Contractor shall not assign any money due or to become due to it under this Agreement without the prior written consent of the City.

## **§11. NOTICES**

All notices required under this Agreement to the parties shall be deemed properly given when deposited in the United States mail, either by registered or certified mail (postage prepaid) to:

To:  
City of Charleston  
William S. Cogswell, Jr.  
Mayor  
PO Box 304  
Charleston, SC 29402

To:  
Kellton Tech Solutions  
Shankar Pesalperthy  
Manger - Operations  
11100 Wildlife Center Dr., Ste. LL 150  
Reston, VA 20190

With copies to:

City of Charleston  
Legal Department  
50 Broad Street  
Charleston, SC 29401

City of Charleston  
Procurement Division  
2 George Street, Suite 3600  
Charleston, SC 29401

**§12. CHANGE ORDERS**

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in this Agreement. The City's Procurement Director shall make all change orders to this Agreement in writing. The City shall not be bound by any change in this Agreement unless approved in writing by the Procurement Director.

**§13. ENTIRE AGREEMENT**

This document and its Exhibits constitute the entire Agreement between the parties and all previous negotiations leading thereto. This Agreement shall be modified only by a written agreement signed by the City and the Contractor.

**§14. GOVERNING LAWS**

The laws of the State of South Carolina shall govern this Agreement. All litigation arising under this Agreement shall be litigated in the Circuit Court in the Ninth Judicial Circuit of Charleston County, South Carolina, in the Court of Common Pleas.

**§15. LICENSE AND PERMITS**

The Contractor shall, without additional expense to the City, be responsible for obtaining all necessary licenses and permits required by the State of South Carolina, or the City of Charleston or any other authority having jurisdiction as necessary to fully perform its obligations pursuant to this Agreement. The Contractor shall provide a copy of its valid City of Charleston Business License to the City upon the execution of this Agreement.

**§16. PUBLICITY RELEASES**

The Contractor agrees not to refer to the award of this Agreement in any commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by the City. The Contractor shall not have the right to include the City's name in its published list of customers without prior approval of the City. With regard to news releases, the Contractor shall only be permitted to use the name of the City and the type and duration of this Agreement in any news releases provided the Contractor shall first have obtained the prior written approval of the City. The Contractor also agrees not to publish, or cite in any form, any comments or quotes from the City's employees unless it is a direct quote from the Public Information Officer of the City.

**§17. INDEPENDENT CONTRACTOR**

The Contractor is an independent contractor and shall not be deemed an employee of the City of Charleston for any purpose whatsoever. The Contractor acknowledges that it is the

Contractor's duty to verify identity and eligibility of its employees and all sub-contractors in accordance with IRCA ("Immigration Reform and Control Act") as amended. The Contractor further agrees to indemnify the City if the Contractor fails to comply with IRCA as amended.

**§18. SEVERABILITY**

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this Agreement is invalid and unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed and enforced as so limited.

**§19. WAIVER OF CONTRACTUAL RIGHTS**

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

**§20. COMPLIANCE WITH LEGAL REQUIREMENTS**

All applicable Federal, State and local laws, ordinances, and rules and regulations of any authorities (including but not limited to any laws, ordinances or regulations relating to the SC Department of Revenue or the SC Board of Contractors) shall be binding upon the Contractor during the term of this Agreement. The Contractor shall be responsible for compliance with any such law, ordinance, rule or regulation, and shall hold the City harmless and indemnify same in the event of non-compliance as set forth in this Agreement.

**§21. BACKGROUND CHECK**

The City reserves the right to conduct criminal background checks on individuals assigned to this project, including the Contractor, its employees, agents or Subcontractors.

**§22. SC STATE AND LOCAL TAX**

Except as otherwise provided, contract prices shall include all applicable state and local taxes.

If applicable, two percent (2%) income tax withholding shall be withheld from each and every payment pursuant to Section 12-9-310 of the South Carolina Code of Laws (1976, as amended) for certain out-of-state contractors, and such sums will be paid over to the South Carolina Department of Revenue and Taxation (the "SCDRT"). When and if the City receives an executed SCDRT form I-312, Nonresident Taxpayer Registration Affidavit – Income Tax Withholding, such withholding shall cease.

Contractor shall calculate that portion of this Agreement that is subject to the nine percent (9%) South Carolina sales and/or use tax, which amount shall be itemized and shown on all invoices, and shall be paid to the SCDRT by the Contractor. If the Contractor is a non-South Carolina company, the City shall withhold said amount from all invoices and remit payment to the SCDRT, unless the Contractor furnishes the City with a valid South Carolina Use Tax Registration Certificate Number. The total of all sales tax to become due and payable in connection with this Agreement is listed herein.

The Contractor shall indemnify and hold harmless the City for any loss, cost, or expense incurred by, levied upon or billed to the City as a result of the Contractor's failure to pay any tax of any type due in connection with this Agreement.

**§23. NONDISCRIMINATION**

The contractor, sub recipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of the contract, which may result in the termination of this contract or such other remedy as the recipient deems appropriate.

**§24. RELEASE OF INFORMATION**

The City of Charleston adheres to the South Carolina Code Title 30, Chapter 4, "Freedom of Information Act," when releasing information upon receipt of a FOIA request. Contractor has a duty to clearly mark any information that is considered proprietary or a trade secret to be removed or redacted according to this statute. Failure to clearly mark proprietary or trade secret information waives any claims Contractor may make against the City regarding the release of information. The City makes best efforts to redact this type of sensitive information, but is under no obligation per SC Code Section 30-4-40(a). Further, the City may, but has no obligation, to inform the Contractor should a FOIA request be made related to the release of Contractor's information.

The City of Charleston adheres to the South Carolina Rules of Court regarding the release of information pursuant to the receipt of a subpoena. Upon receipt of the subpoena where Contractor's information may be responsive material, the City will make a best effort to timely notify Contractor. Contractor must promptly notify City should they intend to quash or prevent any of this information from being released. Failure to notify the City of this intent to quash or prevent the release of information within forty-eight (48) hours of being notified of the receipt of the subpoena waives any claims the Contractor may have against the City for the release of Contractor's information.

The City also follows the South Carolina Department of Archives History records retention schedule and Contractor acknowledges that their records may be maintained and destroyed in accordance with these policies and schedules.

IN WITNESS WHEREOF, the parties hereto, by their authorized representatives, have signed, sealed and delivered this Agreement at Charleston, South Carolina.

WITNESSES FOR THE CITY:

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Date: \_\_\_\_\_

---

Name \_\_\_\_\_

Date: \_\_\_\_\_

AUTHORIZED FOR THE CITY:

---

William S. Cogswell, Jr.

Mayor

Date: \_\_\_\_\_

WITNESSES FOR VENDOR:

SiddhARTH  
Name SIDDHARTH CHAUDHRY

Date: 09/12/2025

Shveta Raul  
Name SHVETA RAUL

Date: 09/12/2025

AUTHORIZED FOR THE VENDOR:



Shankar Pesalperthy

Manager - Operations

Date: 09/12/2025



## EXHIBIT A

### The City of Charleston

### Procurement Division

2 George Street, Suite 3600

Charleston, South Carolina 29401

P) 843-724-7312 F) 843-720-3872

[www.charleston-sc.gov](http://www.charleston-sc.gov)

**Proposal Number:** 24-P028R      **Proposals will be received until:** November 5, 2024 @ 1:00pm

**Proposal Title:** Comprehensive Data Analytics System

**Mailing Date:** October 3, 2024

**Direct Inquiries to:** Robin B. Robinson

**Vendor Name:**

**FEIN/SS#:**

**Vendor Address:**

**City – State – Zip:**

**Telephone Number:**

**Fax Number:**

**Minority or Women Owned Business:**

Are you a certified Minority or Women-Owned business in the State of South Carolina?       Yes     No  
If so, please provide a copy of your certificate with your response.

**Authorized Signature:** \_\_\_\_\_

**Title:** \_\_\_\_\_

**Date:** \_\_\_\_\_

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. This signed page must be included with bid submission.

### **IMPORTANT**

1. This solicitation seeks proposals responding to the Scope of Work for **Comprehensive Data Analytics System**. This solicitation does not commit the City of Charleston to award a contract, to pay any costs incurred in the preparation of applications submitted, or to procure or contract for the services. The City reserves the right to accept or reject any, all or any part of any proposal received as a result of this Solicitation, or to cancel in part or in its entirety this Solicitation if it is in the best interest of the City to do so. The City shall be the sole judge as to whether proposals submitted meet all requirements contained in this solicitation.

*The City of Charleston, South Carolina has received funds from the Bureau of Justice Assistance, and are bidding these items utilizing the 2023 Smart Policing Initiative.*

2. Offeror may **mail**, or **hand-deliver** response to the Procurement Division. **Do Not Fax** in the proposal response. Please show the solicitation number on the outside of any mailing package. The City of Charleston assumes no responsibility for unmarked or improperly marked envelopes. If directing any other correspondence to the Procurement Division not related to the solicitation, please do not include the solicitation number on the envelope. If the Bidder chooses not to respond to this solicitation, it is recommended to return the "No Proposal Response Form" to our office.
3. **DEADLINE FOR SUBMISSION OF OFFER:** Any proposal or offer received after the Procurement Director or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the proposal opening.
4. Questions regarding this solicitation **must be submitted in writing to Robin B. Robinson no later than 1:00pm on October 17, 2024**. Questions may either be faxed to 843-720-3872 or emailed to **Robin B. Robinson, [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov)**.

## **GENERAL INFORMATION**

### **INTRODUCTION**

The City of Charleston Police Department (CPD) is seeking proposals from qualified vendors to provide a comprehensive data analytics system. This system will support our need for basic data collection, robust data analysis, reporting, and visualization capabilities. The objective is to enhance decision-making, optimize operations, and drive strategic initiatives through advanced data analytics.

### **PROCUREMENT PROCESS**

The RFP (*Request for Proposal*) is not a bid. In the event the City elects to negotiate a contract with the successful Vendor, any contract shall contain, at a minimum, the term and conditions (or substantially the same term and conditions) as hereinafter stated. The City reserves the right, in its sole discretion, to reject all submissions, reissue a subsequent RFP, terminate, restructure or amend this procurement process at any time. The final selection and contract negotiation rests solely with the City.

### **QUESTIONS**

Every effort has been made to insure that all information needed by the Offeror is included herein; however, questions are allowed and encouraged to clear up any information as described herein, etc. The City will not accept telephone calls or visits regarding this RFP. All questions shall be in writing and addressed to: Vera White, City of Charleston, Procurement Division, 2 George Street, Suite 3600, Charleston, South Carolina 29401, or email to: [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov). Written Questions may also be faxed to: 843-720-3872. All questions must be received before 1:00pm on October 17, 2024. No interpretation shall be binding upon the City unless in writing from the City's Corporate Counsel.

### **ORAL STATEMENTS**

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. The City of Charleston shall not be legally bound by any amendment or interpretation that is not in writing.

### **NON-ENDORSEMENT**

If a Proposal is accepted, the successful Offeror shall not issue any news releases or other statements pertaining to the award or servicing of the agreement that state or imply the City's endorsement of the successful Offeror's product or services.

### **PROPRIETARY INFORMATION**

If an Offeror does not desire proprietary information in the Proposal to be disclosed, the Offeror shall identify all proprietary information in the Proposal. This identification will be done by individually marking each page with the words "Proprietary Information" or "Confidential" on which such proprietary information is found. If the Offeror fails to identify proprietary information, it agrees that by submission of its Proposal that those sections shall be deemed non-proprietary and made available upon request through the Freedom of Information Act.

### **UNAUTHORIZED COMMUNICATIONS**

Respondents' contact regarding this RFP with employees or officials of the City of Charleston will result in disqualification from this procurement process. Any oral communications are considered unofficial and non-binding with regard to this RFP. The only authorized contacts for this procurement are any designated Procurement staff.

### **CONTRACTOR SOLELY RESPONSIBLE FOR PERFORMANCE**

Vendor shall be responsible for the performance of the services required by the contract. Vendor is an independent contractor and does not act as the City's agent or employee.

### **DISQUALIFICATION OF OFFERORS**

Offerors may be disqualified for any of the following reasons:

- Reason to believe collusion exists among the Offerors
- The Offeror is involved in any litigation against the City
- The Offeror is in arrears on any existing contract or has defaulted on a previous contract with the City
- Lack of financial stability
- Failure to perform under previous or present contracts with the City
- Is currently debarred by the State of South Carolina Procurement Services

### **SUSPENSION AND DEBARMENT**

The Offeror certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any federal, state or local agency. Where the Offeror is unable to certify to any of the statements in this certification, such Offeror shall attach an explanation to this proposal.

### **CONTRACT NEGOTIATIONS**

The City will rank, based upon the evaluation criteria, all responsible and responsive Vendors. The City will begin negotiations with the top ranked Vendors and will continue with negotiation down the ranking until a satisfactory contract with the City is finalized, if any. The terms and conditions of the contract will be no less advantageous than the provisions of this RFP or the Vendor's proposal. The City reserves the right to make a partial award or to split the award at its sole discretion.

### **CONTRACT TERMS**

The initial term of the Agreement shall be for one year. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

### **VENDOR'S DUTY TO INSPECT & ADVISE AND DECLARE ALL COSTS**

Each Vendor shall become fully acquainted with the City's requirements and the scope of commodities and/or services to be provided. Vendor shall have a duty to request any information from the City as it deems necessary to prepare the RFP. No change order will be granted or additional compensation permitted if based upon information the Vendor knew or should have known as part of the Vendor's duty to become acquainted with the City's circumstances and requirements.

## **RECEIPT OF PROPOSALS**

Proposals must be submitted to and received by the City no later than the date and time specified within this RFP. Offerors mailing proposals should allow a sufficient mail delivery period to insure timely receipt (**November 5, 2024 @ 1:00pm**) of their proposal by the City. Proposals received after the scheduled due date and time will not be considered. Proposals must be completed and delivered in sufficient time to avoid disqualification for lateness due to difficulties in delivery. The time and date stamp clock in the City Procurement Division is the official clock for determining whether submittals are submitted on time. The City of Charleston is not responsible for delays in the delivery of mail by the U.S. Postal Service or private couriers. It is the responsibility solely of the Offerors to ensure that its proposal reaches the City of Charleston Procurement Division, by the designated date and time. Proposals received after the scheduled due date and time will not be considered.

**Late Proposal documents will not be accepted under any circumstances.**

## **PROPOSAL SUBMITTAL REQUIREMENTS**

To assure similarity in proposal presentation and allow the Selection Committee to easily compare competing proposals, Offerors shall include, in the order described, the material indicated below. It is not the intent of the City of Charleston to constrain Offerors with regard to content, but to assure that the specific requirements set forth in this RFP are addressed in a uniform manner amenable to Evaluation and Selection Committee review. Offerors may include additional information sections or appendices if desired, to present additional pertinent information. Offerors should submit information in a concise and responsive manner for every requirement. Non-responsive or incomplete submittals or inability to meet City requirements set forth may lead to disqualification of the Offeror's submittal.

**Only information presented in the Proposal will be used to evaluate the submittals. Responses shall be completed in accordance with the requirements in the RFP. Statements made by an Offeror shall be without ambiguity, and with adequate elaboration, where necessary, for clear understanding.**

### **Specific Requirements**

Proposals should be as thorough and detailed as possible so that the City may properly evaluate the Offeror's capabilities to provide the required services. Offerors are required to submit the following items as a complete proposal:

- Complete response to RFP, signed, completed and submitted as required with a detailed outline of the firm's ability of providing the services requested.
- A detailed outline and description of proposed program administration and services.
- A narrative summary of all the deviations from the specifications. The detailed explanation and description of price quotation deviations should be submitted as required in the RFP.
- Sealed package marked on the outside with the Offeror's name, address, and the solicitation number.
- All submittal forms.

## **PROPOSAL FORMAT**

Proposals are to be prepared in a manner design to provide the Selection Committee with a straightforward presentation of the capability to satisfy the requirements of this RFP.

All documentation submitted with the proposal shall be in a single volume. Documentation must be on 8 ½ x 11 pages.

Include the following items:

- RFP Cover Page listing title of project, RFP number, date of submittal, and name of company
- List of lead contact(s) for the City
- List of Qualifications and References: provide at least (4) similar projects past three years. Provide references with accurate and up-to-date contact information. \*Reference form is provided.
- W/MBE Good Faith Effort Form and appropriate Affidavit
- Acknowledgement of any issued Addenda
- Proposal must be signed by an official authorized by the vendor's company to contractually bind the vendor.

## **RESPONSE FORMAT AND ORGANIZATION**

To assure similarity in proposal presentation and allow the evaluation team to easily compare competing proposals, Offerors shall include, in the order described, the material indicated below. It is not the intent of the City to constrain Offerors with regard to content, but to assure that the specific requirements set forth in this RFP are addressed in a uniform manner amenable to Evaluation and Selection Committee review. Offerors may include additional sections or appendices if desired, to present additional pertinent information. Offerors should submit information in a concise and responsive manner for every requirement and every question. Non-responsive or incomplete answers to information requests and/or City requirements may lead to disqualification of the Offeror's submittal.

## **PROPOSAL PREPARATION**

Proposals should provide a straightforward and concise description of the consultant's capabilities to satisfy the requirements of the RFP. It should explain the work to be performed, how the work will be accomplished and the results expected.

All qualifications should be complete and carefully worded and should convey all of the information requested by the City. If errors or exceptions are found in the response, or if the response fails to conform to the requirements of the RFP, the City will be the sole judge as to whether the variance is significant enough to reject the submitted proposal.

## **REQUIRED FORMS AND SIGNATURE PAGES**

Offerors shall include as an appendix, all ancillary forms required in this Request for Proposal (RFP). Required forms include, but are not limited to the following:

- RFP Cover Page
- Certificate of Familiarity
- W/MBE Good Faith Effort Form and appropriate Affidavit
- Any Addenda

## **COMPLETION OF RESPONSES**

Only information presented in the Proposal will be used to evaluate the truck that best fits the needs of the City.

Responses shall be completed in accordance with the requirements of this RFP. Statements made by an Offeror shall be without ambiguity, and with adequate elaboration, where necessary, for clear understanding.

## **QUANTITY AND IDENTIFICATION OF PROPOSALS SUBMITTED**

Each vendor must submit the following:

- **One (1) original un-bound, single-sided Proposal labeled as “ORIGINAL”**
- **Four (4) bound, double-sided Proposals**
- **One (1) electronic copy on a flash drive. Please have submittal on flash drive divided into two documents: 1) the proposal; and 2) the cost.**
- The Vendor must mark on the envelope or box containing the proposal the following information: “24-P028R Comprehensive Data Analytics System”
- Note the RFP identification number on the outside of the envelope or box
- All Proposals, including original, copies and the flash drive, shall be submitted together in one envelope or box
- Proposals must be submitted by mail or hand delivered to City of Charleston, Procurement Division, 75 Calhoun Street, Ste. 3500, Charleston, SC 29401, ATTN: 24-P028R

**No more than one proposal may be submitted by any Vendor.**

## **PROPOSAL EVALUATION PROCESS**

An Evaluation and Selection Committee will be established to evaluate the Proposals and select a proposal which represents the best value to the City. The Evaluation and Selection Committee will be comprised of City personnel and any other persons as designated by the City. This Committee will determine the responsiveness and acceptability of each proposal. The Evaluation and Selection Committee may request additional information from Offerors.

The City will conduct a comprehensive, fair and impartial evaluation of all Proposals received in response to this RFP. Each Proposal received will first be analyzed to determine overall responsiveness and completeness to this RFP. Each Proposal will then be evaluated based on each of the criteria as outlined in Proposal Evaluation Criteria Factors, and after which identified as either reasonably qualified or unqualified. A Proposal may be declared unqualified if it clearly fails to demonstrate, in any of the listed areas, a standard that the City believes necessary to meet the requirements set forth in this RFP.

Following their review of all submitted Proposals, the Selection Committee may select a shortlist of the highest ranked reasonably-qualified Offerors. Shortlisted Offerors will be invited to present their Proposal to the Evaluation and Selection Committee.

After the proposals are evaluated, the City will determine whether formal presentations and interviews are necessary, and if so, which vendors may be invited to make a formal presentation and/or sit for a panel interview. The City may choose not to require formal presentations or

interviews. The City may choose to contact officials from other jurisdictions regarding the vendor, their prior work experience and their ability to successfully complete the scope of services. The City may request clarification or additional information from a specific vendor in order to assist in the City's evaluation of a proposal. Finally, the City may require changes in the scope of services as deemed necessary by the City, before execution of the contract.

### **PROPOSAL EVALUATION CRITERIA FACTORS**

The following weighted criteria will be used to evaluate the Proposals for purposes of selecting the Offeror(s) to negotiate with or to shortlist.

#### **Criteria Factors**

- Technical capabilities and solution fit
- Vendor's experience and expertise
- Project plan and implementation approach
- Itemized Cost and overall value

It is the Offeror's responsibility to effectively communicate their qualifications, services, and products to the City by thoroughly responding to each requirement contained in this RFP.

# Comprehensive Data Analytics System Specifications

## 1. Introduction

The City of Charleston Police Department (CPD) is seeking proposals from qualified vendors to provide a comprehensive data analytics system. This system will support our need for basic data collection, robust data analysis, reporting, and visualization capabilities. The objective is to enhance decision-making, optimize operations, and drive strategic initiatives through advanced data analytics.

## 2. Background

This project is made possible by funding from U.S. Department of Justice, Bureau of Justice Assistance (see attached grant solicitation). The goal of the project is to allow the CPD to collect and visualize existing data from several, linked electronic sources in a user-friendly system that supports and presents the agency's problem-oriented policing efforts for both internal and external users.

Current deficiencies in CPD's data collection and storage systems limit its ability to realize the technological objectives of this grant-funded project. The CPD has many disparate datasets due to state and local requirements that have created data silos. To overcome the analytical hurdles, the CPD has implemented system and procedural changes to bridge the gap between datasets and link them together. The department's current challenge is performing consistent and swift data cleaning and preparation, as well as product creation for both departmental and public stakeholders. These processes are extremely labor-intensive and time-consuming, creating latency, the potential for variability, and a gap in access to data for stakeholders outside of its analytical unit. The goal is to leverage this grant to create a comprehensive workflow that would incorporate data modeling to assist with cleaning, product creation, and the publishing of dashboards and reports. This will allow for further automation, better consistency, greater access, and increase the CPD personnel's capacity to spend more time analyzing data in-depth rather than simply compiling them.

## 3. Project Scope

The scope of this project includes the design, implementation, and support of a data analytics system that meets the following requirements:

- Data Collection
- Data Integration
- Data Storage and Management
- Data Processing and Analysis
- Data Visualization
- Reporting
- User Access and Security
- Training and Support

## 4. Key Requirements

### 4.1 Data Collection

- Ability to capture data, via a web-form, into a database for future analysis.

#### **4.2 Data Integration**

- Capability to integrate data from multiple sources (e.g., databases, cloud services, third-party applications).
- Support for real-time data ingestion and batch processing.
- Capability to ingest flat files.

#### **4.3 Data Storage and Management**

- Scalable storage solutions to handle increasing volumes of data.
- Efficient data retrieval and management capabilities.
- Data replication for reporting/analysis.
- Full administrative access for CPD admins.
- On premises or cloud host (CJIS Certified) acceptable.

#### **4.4 Data Processing and Analysis**

- Advanced analytics tools (e.g., statistical analysis, geospatial analysis, machine learning).
- Ability to assist with data quality.
- Support for custom analytics models and scripts (e.g., Python, R).
- Support for data naturalization between legacy and next-generation systems.

#### **4.5 Data Visualization**

- Web based access. No software client necessary for end user.
- Interactive and customizable dashboards.
- Variety of visualization options (e.g., charts, graphs, maps).
- Advanced geo-spatial representation.
- Support for ArcGIS layers.

#### **4.6 Reporting**

- Automated report generation and scheduling.
- Customizable report templates.
- Ability to publish to an access controlled web portal.
- Ability to automate emailing of generated reports.

#### **4.7 User Access and Security**

- Role-based access control. (Active directory and non-active directory account support)
- Data encryption and compliance with relevant data protection regulations.

#### **4.8 Training and Support**

- Comprehensive training for end-users and administrators.
- Ongoing technical support and system maintenance.

### **5. Proposal Requirements**

Vendors should include the following information in their proposals:

#### **5.1 Executive Summary**

- Overview of the proposed solution.
- Summary of key benefits and unique features.

## **5.2 Company Profile**

- Company history and background.
- Relevant experience and case studies.

## **5.3 Technical Approach**

- Detailed description of the proposed system architecture.
- Explanation of data integration, storage, processing, and visualization capabilities.
- Security measures and compliance standards.

## **5.4 Project Plan**

- Implementation timeline with key milestones.
- Project management approach and methodologies.

## **5.5 Cost Proposal**

- Detailed pricing breakdown (e.g., software licenses, implementation services, training, support).
- Total cost of ownership over a specified period (e.g., 3-5 years).

## **5.6 References**

- Contact information for at least four clients who can provide references regarding similar projects.

<b>Proposal Number:</b> 24-P028R	<b>Proposals will be received until:</b> November 5, 2024 @ 1:00pm
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<b>Proposal Title:</b> Comprehensive Data Analytics System
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<b>Mailing Date:</b> October 3, 2024	<b>Direct Inquiries to:</b> Robin B. Robinson
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### **CERTIFICATE OF FAMILIARITY**

The undersigned, having fully familiarized himself with the information contained within this entire solicitation and applicable amendments, submits the attached proposal, and other applicable information to the City, which I verify to be true and correct to the best of my knowledge. I further certify that this proposal response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, equipment or services in all respects, fair and without collusion or fraud. I agree to proposal by all conditions of this solicitation and certify that I am authorized to sign this proposal. I further certify all prices submitted shall remain effective for a minimum period of ninety (90) days, unless otherwise stated.

Company Name  
As registered with the IRS

Authorized Signature

Correspondence Address

Printed Name

City, State, Zip

Title

Email

Telephone Number/Toll Free Also (If Available)

Remittance Address

Fax Number

City, State, Zip

Date

Federal Tax ID (FEIN)/SS Number

SC Sales Tax Number

**Minority or Women-Owned Business:**

Are you a certified Minority or Women-Owned business in the State of SC?

Yes       No

If so, please provide a copy of your certificate with your response.

## NO PROPOSAL RESPONSE FORM

<b>Proposal Number:</b> 24-P028R	<b>Proposals will be received until:</b> November 5, 2024 @ 1:00pm
<b>Proposal Title:</b> Comprehensive Data Analytics System	
<b>Mailing Date:</b> October 3, 2024	<b>Direct Inquiries to:</b> Robin B. Robinson
<b>Vendor Name:</b>	<b>FEIN/SS#:</b>
<b>Vendor Address:</b>	
<b>City – State – Zip:</b>	
<b>Telephone Number:</b>	<b>Fax Number:</b>
<b>Minority or Women Owned Business:</b> Are you a certified Minority or Women-Owned business in the State of South Carolina? <input type="checkbox"/> Yes <input type="checkbox"/> No If so, please provide a copy of your certificate with your response.	
<b>Authorized Signature:</b> _____	<b>Title:</b> _____
<b>Date:</b> _____	
I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. <b>This signed page must sent in if not sending in a submission.</b>	

To submit a “No Proposal” response for this project, this form must be completed for your company to remain on our Offeror’s list for commodities/services referenced. If you do not respond, your name may be removed from the Offeror’s list.

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Please check statement(s) applicable to your “No Proposal” response

- Specifications are restrictive; i.e. geared toward one brand or manufacturer only (explain below).
- Specifications are ambiguous (explain below).
- We are unable to meet specifications.
- Insufficient time to respond to the solicitation.
- Our schedule would not permit us to perform.
- We are unable to meet bond requirements.
- We are unable to meet insurance requirements.
- We do not offer this product or service.
- Remove us from your vendor list for this commodity/service.
- Other (specify below).

**Comments:** \_\_\_\_\_

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## References

Offerors must supply a minimum of four (4) references for which they have provided the same or similar services being requested in the Scope of Work. If the references have not used similar services, please outline the services that your company has provided to these clients.

<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____
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<b>Email:</b> _____
<b>Name:</b> _____
<b>Address:</b> _____ _____
<b>Phone/Fax:</b> _____
<b>Email:</b> _____

## **MWBE Compliance Provisions and Instructions**

### **Minority/Women Business Enterprise Program Forms**

This Project is covered under the City of Charleston's Minority/Women Business Enterprise (MWBE) Program, administered by Ruth Jordan, MBE Manager, 2 George Street, Suite 3600, Charleston SC, 29401, (843) 724-7434.

The City has established goals for both Minority Business Enterprises (MBE) and Women Business Enterprises (WBE). An MBE is a small business owned and controlled by a minority. A WBE is a small business owned and controlled by a woman. The minority or woman must own fifty-one percent (51%) of the business and they must control the management and daily operations of the business in order to qualify.

Charleston City Council has adopted a policy setting 20% MWBE participation as the goal for this project. In order to meet this goal, the MBE/WBE subcontractors must have a Certificate of Eligibility on file with the City's Minority Business Enterprise Office or a reciprocal certification at the time of execution of the contract. All bidders must document the extent of their effort to meet this goal by completing the MWBE Compliance Affidavits below.

A list of certified minority and women-owned firms can be found on the City of Charleston's web site [www.charleston-sc.gov](http://www.charleston-sc.gov) under "BIDLINE" link or by contacting Ruth Jordan, MBE Manager, 2 George Street, Suite 3600, Charleston SC, 29401, (843) 724-7434, [jordanr@charleston-sc.gov](mailto:jordanr@charleston-sc.gov).

#### **COMPLIANCE REQUIREMENTS:**

The Bidder shall provide, with their bid form submittal, the following Affidavits properly executed which signify that the Bidder understands and agrees to abide by the City's MWBE Compliance Provisions. All Bidders must provide either (a) Affidavits A and B or (b) Affidavit C. If a Bidder provides Affidavit C, the Bidder does not need to provide Affidavits A or C.

- Affidavit A - Listing of the Good Faith Effort to Identify & Secure Minority and Women-owned Business Participation.**  
AND  
 **Affidavit B – Work to be Performed by Minority and/or Women-owned Firms**  
OR  
 **Affidavit C – Intent to Perform Contract with Own Workforce**, in making this certification the Bidder states that the Bidder does not customarily subcontract elements of this type of Project and will perform all elements of the work with his/her own current work forces.

Failure to comply with any of the statements, certifications, or intentions stated in the affidavits, or the MBE/WBE compliance provisions shall constitute a breach of the Contract. Any such breach may result in termination of the Contract in accordance with the termination provisions contained in the Contract. It shall be solely at the option of the City of Charleston whether to terminate the contract for breach. In addition to terminating the Contract, the bidder may be prohibited from participation in future solicitations as determined by the City of Charleston.

Name of Company: \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Witness \_\_\_\_\_

**AFFIDAVIT A**  
Page 1 of 2

**City of Charleston, South Carolina Listing of the Good Faith Effort**

Affidavit of \_\_\_\_\_  
(Name of Bidder)

**I have made a good faith effort to comply with the City of Charleston's MWBE compliance provisions under the following checked areas:**

*(A minimum of 6 areas must be checked in order to have achieved a "good faith effort")*

- 1. Contacted MWBE businesses that reasonably could have been expected to submit a quote and that were known to the Bidder, or available on Federal, State or local government maintained lists, at least 10 business days before the submittal date and notified them of the nature and scope of the work to be performed. *Complete Affidavit A, Page 2.*
- 2. Followed up with contacted MWBE subsequent to the initial contact and at least 72 hours prior to submittal deadline/bid opening either by phone, facsimile or in person.
- 3. Made the construction plans, specifications, and requirements available for review by prospective MWBE businesses, or providing these documents to them at least 10 business days before the submittal deadline/bid opening.
- 4. Itemized elements of the work or combined elements of the work into economically feasible units to facilitate MWBE participation.
- 5. Attended any pre-solicitation meetings scheduled by the City.
- 6. Provided MWBE assistance with getting required bonding or insurance requirements or provided alternatives to bonding or insurance.
- 7. Negotiated in good faith with interested MWBEs and did not reject them as unqualified without sound reasons based on their capabilities. *(Any rejection of a minority or woman-owned business based on lack of qualifications shall include reasons for rejection documented in writing.)*
- 8. Provided MWBEs assistance with securing needed equipment, loan capital, lines of credit, or joint pay agreements to secure loans, supplies, or letters of credit, including waiving credit that is ordinarily required. Assisted MWBEs in obtaining the same unit pricing with the Bidder's suppliers in order to help such businesses in establishing credit.
- 9. Provided training or mentoring to at least two (2) MWBEs within 120 days prior to submittal deadline/bid opening. The training or mentoring program should be in conjunction with local trade groups, technical schools or community organizations that provide recruitment, education or skill levels.
- 10. Negotiated joint venture, partnership or other similar arrangements with MWBEs in order to increase opportunities for MWBE participation.
- 11. Provided quick pay agreements and policies to enable MWBE contractors and suppliers to meet cash-flow demands.

I hereby agree to enter into a formal agreement with the firms listed in Affidavit B Work to be performed by Minority Firms conditional upon execution of a contract with the Owner. Failure to abide by this provision will constitute a breach of the contract.

I hereby certify that I have read and agree to the terms of the Minority / Women-Owned Business Enterprise Program, and I am the Bidder or I am authorized to bind the Bidder to the commitment herein set forth.

Date: \_\_\_\_\_ Name of Authorized Officer (Print/Type): \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

**AFFIDAVIT A**

Page 2 of 2

**City of Charleston, South Carolina Minority/Women-Owned Business Participation Efforts**  
(Use as many sheets as necessary)

I, \_\_\_\_\_, hereby certify that on this project we contacted the following minority/women-owned business enterprises as subcontractors, vendors, suppliers, or providers of professional services.

1. Minority Firm Name and Contact	Minority Firm Address
Minority Firm Telephone Number _____ Minority Firm Fax Number _____ DBE Certification Number _____	<b>Minority Group Type</b> <input type="checkbox"/> (African American) <input type="checkbox"/> (Women) <input type="checkbox"/> (Asian American) <input type="checkbox"/> (Hispanic) <input type="checkbox"/> (American Indian) <input type="checkbox"/> (Other)  <input type="checkbox"/> Follow up Verification
2. Minority Firm Name and Contact	Minority Firm Address
Minority Firm Telephone Number _____ Minority Firm Fax Number _____ DBE Certification Number _____	<b>Minority Group Type</b> <input type="checkbox"/> (African American) <input type="checkbox"/> (Women) <input type="checkbox"/> (Asian American) <input type="checkbox"/> (Hispanic) <input type="checkbox"/> (American Indian) <input type="checkbox"/> (Other)  <input type="checkbox"/> Follow up Verification
3. Minority Firm Name and Contact	Minority Firm Address
Minority Firm Telephone Number _____ Minority Firm Fax Number _____ DBE Certification Number _____	<b>Minority Group Type</b> <input type="checkbox"/> (African American) <input type="checkbox"/> (Women) <input type="checkbox"/> (Asian American) <input type="checkbox"/> (Hispanic) <input type="checkbox"/> (American Indian) <input type="checkbox"/> (Other)  <input type="checkbox"/> Follow up Verification
4. Minority Firm Name and Contact	Minority Firm Address
Minority Firm Telephone Number _____ Minority Firm Fax Number _____ DBE Certification Number _____	<b>Minority Group Type</b> <input type="checkbox"/> (African American) <input type="checkbox"/> (Women) <input type="checkbox"/> (Asian American) <input type="checkbox"/> (Hispanic) <input type="checkbox"/> (American Indian) <input type="checkbox"/> (Other)  <input type="checkbox"/> Follow up Verification

I certify, under penalties of perjury, that I have examined the information in this affidavit, and to the best of my knowledge and belief, this information is true, correct and complete.

Date: \_\_\_\_\_ Name of Authorized Officer (Print/Type): \_\_\_\_\_

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Signature: \_\_\_\_\_

Notary Public for the State of \_\_\_\_\_  
My Commission Expires: \_\_\_\_\_

Title: \_\_\_\_\_

Print Name: \_\_\_\_\_

Notary Seal: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

## AFFIDAVIT B

### City of Charleston, South Carolina Work to be Performed by Minority/Women-Owned Businesses

Affidavit of \_\_\_\_\_ I hereby certify that on the \_\_\_\_\_  
(Name of Bidder) \_\_\_\_\_, Total Project Amount \$ \_\_\_\_\_  
(Project Name)

I will make a good faith effort to expend a minimum of \_\_\_\_\_ % of the total dollar amount of the Contract with minority/women-owned business enterprises. Minority/women-owned businesses will be employed as subcontractors, vendors, suppliers, or providers of professional services. Such work will be subcontracted to the following businesses listed below:

(Attach additional sheets if needed)

Name and Phone Number	*Minority Code	Work Description	Dollar Value
			\$
			\$
			\$
			\$
			\$
			\$
			\$

Total MBE Participation: \_\_\_\_\_ %    \$ \_\_\_\_\_

\* Minority categories: African American (B); Hispanic (H); Asian American (A), American Indian (I); Woman Owned (W); Other (D)

I will enter into a formal Contract with the above minority/women-owned business enterprises for the work listed in the above schedule conditional upon execution of a Contract with the Owner.

I certify that I have read the terms of this commitment and I am the Bidder or authorized to bind the Bidder to the commitment set forth herein. I certify, under penalties of perjury, that I have examined the information in this affidavit, and to the best of my knowledge and belief, this information is true, correct and complete.

Date: \_\_\_\_\_ Name of Authorized Officer (Print/Type): \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_\_. Notary Public for the State of \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

Notary Seal: \_\_\_\_\_

Print Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

## AFFIDAVIT C

### City of Charleston, South Carolina Intent to Perform Contract with Own Workforce.

Affidavit of \_\_\_\_\_  
(Name of Bidder)

I hereby certify that it is our intent to perform 100% of the work required for the \_\_\_\_\_  
contract.  
(Name of Project)

In making this certification, the Bidder states that the Bidder does not customarily subcontract elements of this type Project, and normally performs and has the capability to perform and will perform all the elements of the work on this Project with his/her own current work forces, and

The Bidder agrees to provide any additional information or documentation requested by the Owner in support of the above statement.

I hereby certify that I have read this certification and I am the Bidder or I am authorized to bind the Bidder to the commitments contained herein. I certify, under penalties of perjury, that I have examined the information in this affidavit, and to the best of my knowledge and belief, this information is true, correct and complete.

Date: \_\_\_\_\_ Name of Authorized Officer (Print/Type): \_\_\_\_\_

Signature: \_\_\_\_\_

Title: \_\_\_\_\_

Sworn to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

Notary Seal:

Notary Public for the State of \_\_\_\_\_

My Commission Expires: \_\_\_\_\_

Print Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Address: \_\_\_\_\_

## INSURANCE REQUIREMENTS

Contractors working for the City of Charleston are required to procure and maintain for the duration of their contract with the City insurance against claims for injuries to persons or damages to property, which may arise from or in connection with work performed by the Contractor, his agents, representatives, employees or Subcontractors. The cost of such insurance shall be the responsibility of the Contractor.

- A. The Contractor shall carry liability insurance with a reliable company licensed to do business in South Carolina. Coverage shall be at least broad as:
  - 1. Insurance Services Office Commercial General Liability Coverage Form ("occurrence") CG 00 01 10 93.
  - 2. Insurance Services Office Business Auto Coverage Form CA 00 01 6 92 covering automobile liability, code 1 "any auto".
- B. Contractor shall carry workers' compensation as required by the State of South Carolina and Employers Liability insurance (including applicable occupation disease provisions and all state endorsements.)
- C. Contractor shall maintain limits no less than the following:
  - 1. **GENERAL LIABILITY:** \$1,000,000 combined single limit per occurrence for bodily injury, property damage, and personal injury with a \$2,000,000 general aggregate limit.
  - 2. **AUTOMOBILE LIABILITY:** \$1,000,000 combined single limit per accident for bodily injury and property damage.
  - 3. **WORKERS' COMPENSATION:** Statutory limits are required by South Carolina state law and employer's liability limits of \$100,000 per accident.
  - 4. **PROFESSIONAL LIABILITY:** \$1,000,000 per claim/\$1,000,000 aggregate limit, with a deductible of \$20,000.

Contractor shall obtain and maintain a professional liability insurance policy covering the performance of the professional services specified in this agreement. Evidence of such insurance shall be satisfactory in form and content to the owner, the City. This coverage shall be maintained through the duration of this project and for a minimum of 1 year after substantial completion of the project as determined by the City.

The Contractor and any of its subcontractors will cause the professional liability insurance required in this paragraph C.4:

- (a) to be excess insurance over any project professional liability policy, and

- (b) to be primary insurance in the event the project insurance described in Paragraph E is canceled or not maintained, in the event the policy's limits of liability are exhausted, or if the policy expires.

D. Required policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability and Automobile Liability Coverages

The City of Charleston, its officials, employees and volunteers are to be covered as additional insureds as respects: Liability arising out of activities performed by or on behalf of the Contractors; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City of Charleston, its officials, employees or volunteers. To accomplish this objective, the City of Charleston shall be named as an additional insured under the Contractor's general liability policy by attaching Insurance Services Office Commercial General Liability Endorsement CG2010 10 93 (Additional Insured - Owners, Lessees or Contractors - Form B) or its equivalent. Contractors' insurance coverage shall be primary insurance as respects the City of Charleston, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City of Charleston, its officials, employees, or volunteers shall be in excess of the Contractor's insurance and shall not be required to contribute. To accomplish this objective, the following wording should be incorporated in the previously referenced additional insured endorsement.

Other Insurance: This insurance is primary, and our obligations are not affected by any other insurance carried by the additional insured whether primary, excess, contingent or on any other basis.

Any failure to comply with reporting provisions of the Contractor's policies shall not affect coverage provided to the City of Charleston, its officials, employees or volunteers.

2. Workers' Compensation

The Contractor shall agree to waive all rights of subrogation against the City of Charleston, its officials, employees and volunteers for losses arising from work performed by the Contractor for the City of Charleston.

- E. Any deductibles or self-insured retentions shall be the responsibility of the Contractor.
- F. Each insured policy required by the City of Charleston shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or in limits except after thirty (30) days prior written notice has been given to the City of Charleston.
- G. All coverages for Subcontractors shall be subject to all the requirements stated herein.
- H. Insurance must be placed with an approved insurance company with current Best's rating of A+, A, or A-. Exceptions to this requirement must be approved in writing by the City of Charleston.

- I. Contractor shall furnish the City of Charleston with Certificates of Insurance noting the endorsements. The Certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the City of Charleston, Procurement Division, before work commences. The City of Charleston reserves the right to require complete, certified copies of all required insurance policies, at any time.

Required certificates should be mailed to:

City of Charleston  
Procurement Division  
2 George Street, Ste. 3600  
Charleston, SC 29401

## **INSTRUCTIONS TO OFFERORS**

1. Number of Submittals required is stated in the General Information section of this Solicitation. Proposals must be mailed or hand-delivered. **Responses received by fax or other electronic means (email, CD, etc.) will be rejected. Proposals must be submitted in a sealed envelope and must be addressed to the City of Charleston Procurement Division, 2 George Street, Suite 3600 Charleston, SC 29401.** Failure to do so may result in a premature opening of, or failure to open such Proposal. Each sealed envelope containing a Proposal shall be marked on the outside with the Offeror's complete Name, Address, Solicitation Number, Description of Services Requested by Solicitation (i.e., Elevator Maintenance, Road Construction), along with the Due Date and Time. If you do not choose to submit a proposal, please complete and return the enclosed "No Proposal" response form.

A "No Proposal" qualifies as a response; however, it is the responsibility of the Vendor to notify the Procurement Office if you receive solicitations that do not apply. Failure to respond to three (3) solicitations during the calendar year may result in removal from Vendor's List.

**All pages that require a Signature shall be included with the proposal. Failure to include these required pages may result in the proposal being deemed Non-Responsive.**

2. Offerors must clearly mark as "**Confidential**" each part of their proposal which they consider to be proprietary information that could be exempt from disclosure under the South Carolina Freedom of Information Act, S.C. Code Ann. §§ 30-4-10 to – 165 (2007 & Supp. 2015). See paragraph 45 for more details. The City reserves the right to determine whether this information should be exempt from disclosure and no legal action may be brought against the state or its agents for its determination in this regard.
3. Proposals must be made in the official name of the individual, firm, company, partnership, corporation, joint venture or other legal entity under which the business is conducted (showing official business address) and must be signed in ink by a person duly authorized to legally bind the legal entity submitting the proposal.
4. Proposals should be typewritten or computer-generated; however, if this is not possible, the hand writing **must be legible**. A Proposal shall include, but is not limited to, addresses of all legal entities which will participate in the proposed services. The type of organization of the Bidder, whether individual, firm, partnership, corporation, joint venture or other legal entity, shall be stated. Any affiliations, parent-subsidiary relationships, and corporate identities including the names of the principals of such legal entity must be fully disclosed and clearly explained.
5. If an error is made before submitting the proposal, the error should be crossed out, corrections entered and initialed by the person signing the proposal. Erasures or use of typewriter correction fluid may be cause for rejection. No proposal shall be altered or amended after specified time for opening.
6. Proposals may be withdrawn by written request received from the Offeror prior to the time set for opening of Proposals, but not thereafter.

7. Proposals should be prepared simply and economically. All data, materials, and documentation shall be available in a clear, concise form and reproducible upon request "at cost" for the City's internal use. The City reserves the right to reproduce proposals for internal use in the evaluation process.
8. All Proposals shall provide a straight forward, concise description of Offeror's ability to satisfy the requirements of the Solicitation.
9. All Addendum and Award Notices will be posted on our website: [www.charleston-sc.gov](http://www.charleston-sc.gov), then click on the Bidline link.
10. The terms and conditions in this Solicitation shall prevail unless otherwise modified by the City of Charleston in an Addendum to this Solicitation. The City of Charleston reserves the right to reject, in whole or in part, any proposal which does not comply with such terms and conditions. The City of Charleston reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the Offeror of the conditions contained in this Solicitation, unless clearly and specifically noted in the proposal submitted and confirmed in any resulting contract between the City of Charleston and the Offeror selected.
11. No substitutions shall be considered after the contract award except by Amendment.
12. The City seeks qualified vendors to be responsible for completion of the work described herein and the City reserves the option to award portions of the project to multiple Offeror if such is to the advantage of the City. Therefore, any one proposal submitted by more than one company shall be deemed to be a proposal for a joint venture between or among the companies so submitting proposals unless the proposal clearly and unequivocally describes that only one firm proposes to act as principal and the other firm(s) contractual position is clearly defined. The companies submitting as a joint venture shall be held jointly and severally responsible for the entire project and shall not be permitted to limit their liability to the City.
13. All proposals should be complete and carefully worded and shall convey all of the information requested by the City. If errors or exceptions are found in a proposal, or if the proposal fails to conform to the requirements of the Solicitation, the City shall be the sole judge as to whether that variance is significant enough to reject the proposal.
14. The City reserves the right to request satisfactory evidence of their ability to furnish services in accordance with the terms and conditions listed herein. The City further reserves the right to make the final determination as to the Offeror's ability to provide said services.
15. The Offeror is solely responsible for all costs and expenses associated with the preparation of the proposal and of any supplementary presentation (including any oral presentation) requested by the City.
16. **GRATUITIES AND KICKBACKS**  
A) Gratuities. It shall be unethical for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or

agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim or controversy, or other particular matter pertaining to any program requirement or a contract or subcontract, or to any solicitation or proposal therefore.

B) **Kickbacks.** It shall be unethical for any payment, gratuity, or offer of employment to be made by or on behalf of a subcontractor under a contract to the prime contractor, or to hire any subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

17. **OFFEROR REPRESENTATIONS**

Each Offeror by submitting a Proposal represents that:

A) The Offeror has read and understands this Solicitation (including all Specifications and Attachments) and that its Proposal is made in accordance therewith.

B) The Offeror has reviewed the Solicitation and has become familiar with the local conditions under which the Scope of Work is to be performed. The failure or omission of an Offeror to acquaint himself with existing conditions shall in no way relieve him of any obligation with respect to this proposal or any resulting contract.

C) The Proposal is based on the terms, materials, services and obligations required by this Solicitation, without exception.

D) The Offeror is qualified to provide the services and equipment required under this Solicitation and, if awarded the contract, shall do so in a professional, timely manner using successful Offeror's best skills and attention.

E) The Offeror is guaranteeing that all goods and services will meet the requirements of the Solicitation during the contract period.

18. **COMPETITIVE PROCUREMENT**

It is the intent and purpose of the City of Charleston that this Solicitation permits competition. It shall be each Offeror's responsibility to advise the City if any language, provision, or other requirement, or any combination thereof, inadvertently restricts or limits the satisfaction of the specifications stated in this Solicitation to a single source. Such notification must be submitted in writing, and must be received by the City of Charleston Procurement Division no later than the last date for written questions. Any such notification shall be reviewed by the City's Procurement Director.

19. **ADDENDA/CHANGES**

Any additions, deletions, modifications, or changes made to this Solicitation shall be processed through the City's Procurement Director. Any deviation from this procedure may result in the disqualification of the proposal or the cancellation of any contract resulting from this Solicitation. Requests for interpretation of this Solicitation and any other questions concerning the Solicitation

shall be made in writing, and addressed to the City's Procurement Director, 2 George Street, Suite 3600, Charleston, South Carolina 29401. Questions may be transmitted by fax, but it shall be the responsibility of the sender to confirm receipt by the City. These requests must be submitted by the deadline for written questions. Responses to said requests shall be made at the discretion of the City's Procurement Director. When issued, such interpretations and answers to such questions shall be in the form of an addendum to the Solicitation which shall be posted on the City's website, [www.charleston-sc.gov](http://www.charleston-sc.gov). All such addenda shall become part of the Solicitation and each Offeror shall be bound by such addenda whether or not received by the Offeror. The City of Charleston shall not be legally bound by any amendment or interpretation that is not in writing.

**20. EVALUATION PROCESS**

During the evaluation process the City of Charleston reserves the right, where it may serve the City of Charleston's best interest, to request additional information or clarification from Offerors, or to allow corrections of errors or omissions.

**21. AWARD OF CONTRACT**

- A) Award of contract shall be made to the most responsive and responsible Offeror(s) whose Proposal, conforming to the Solicitation, is most advantageous to the City of Charleston, price and other factors considered.
- B) The City of Charleston may, when in the best interest of the City, reject any or all Proposals or waive technicalities or informalities in any Proposals received.
- C) The City of Charleston shall be the sole judge of the suitability of the items or services to be provided pursuant to this Solicitation.
- D) The City may choose to award to more than one vendor if it is in the best interest of the City.
- E) Final approval may rest with members of the City Council for the City of Charleston.
- F) All things considered equal, a tie proposal will be resolved by the flip of a coin.

**22. CONTRACT ADMINISTRATION**

Questions or problems arising after award of this contract shall be directed to the Contracts Coordinator by calling (843) 965-4184. Copies of all correspondence concerning this contract shall be sent to the Contracts' Coordinator, 2 George Street, Suite 3600 Charleston, SC 29401.

**23. NOTICE OF AWARD OF CONTRACT**

The successful Offeror shall be notified of acceptance of its Proposal by a written Notice of Award of Contract. Successful Offeror(s) shall not undertake any work, and City shall not be responsible for payment for any work whatsoever undertaken by the successful Offeror(s) prior to issuance of the Notice to Proceed.

**24. NOTICE TO PROCEED**

A Notice to Proceed shall be issued after the Contractor(s) has executed the contract and has submitted acceptable Insurance Certificate(s) and Endorsement(s) and Performance and Payment Bonds to the City as well as other submittals specified herein as required to be delivered before the

Notice to Proceed is issued. The Contractor(s) shall not commence work until it has received a written Notice to Proceed from the City's Director of Procurement.

**25. OTHER CONTRACTS**

The City of Charleston may undertake or award other contracts for portions of the work or additional work, and the Contractor(s) shall fully cooperate with such other contractors and City of Charleston employees and carefully fit its own work to such work as may be directed by the City. The Contractor(s) shall not commit or permit any act which shall interfere with the performance of work by any other contractor or by City of Charleston employees.

**26. MODIFICATION**

The City's Director of Procurement shall have the unilateral right to modify any contract resulting from this Solicitation, within the general scope of work, when said modification is in the best interest of the City. The right to issue change orders is not dependent upon the consent of the successful Offeror(s). At the direction of the Director of Procurement the successful Offeror is obligated to perform the revised contract. Contract fees or prices shall be equitably adjusted where an issued change order so demands. No claim by the successful Offeror(s) for an adjustment hereunder shall be allowed if asserted after final payment under aforesaid contract.

**27. INDEPENDENT CONTRACTOR**

Successful Offeror is an independent contractor and shall not be deemed the agent or employee of the City of Charleston for any purpose whatsoever.

**28. INSURANCE REQUIREMENTS**

Upon the consummation of the contract for the services being solicited in this Solicitation and receipt of the Notice of Award by the successful Offeror (the "Contractor"), the Contractor shall, at all times during the term of the contract, carry insurance as required by the insurance requirements outlined in the insurance attachment which is attached hereto and incorporated by reference. The City shall not issue a Notice to Proceed until the Contractor has submitted acceptable insurance certificates(s) or endorsement(s), which must be submitted within five (5) calendar days after receipt of the Notice of Award, and which reflect that the required coverages are in place and that all premiums have been paid. Refusal or failure to submit such certificate(s) or endorsement(s) shall constitute grounds for the City to revoke its notice of award, forfeit proposal security, and award the contract to another contractor. The City may contact the Contractor's insurer(s) or insurer(s)' agent(s) directly at any time regarding its coverages, coverage amounts, or other such relevant and reasonable issues related to this contract. The Contractor(s) shall also require any sub-contractors to carry the same coverages in the same amounts. Faxed Insurance Certificate(s) and Endorsement(s) shall be accepted if received no later than the time of contract execution and the original documents are received within one (1) business day after receipt of the fax transmittals.

**29. INDEMNIFICATION**

The Contractor hereby expressly agrees to indemnify and hold the City harmless against any and all expenses and liabilities arising out of the performance or default of this Agreement as follows:

The Contractor expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or Subcontractors or any person,

firm, or corporation directly or indirectly employed by the Contractor, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the City and its employees or by any member of the public, to indemnify and save the City and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs and expenses arising out of the performance or default of this Agreement. Such costs shall include defense, settlement, court costs and reasonable attorneys' fees incurred by the City and its employees. This promise by the Contractor to indemnify the City shall include bodily injuries or death occurring to the City's officers, officials, employees and any person directly or indirectly employed by the City, the City's employees, the employees of any other independent contractors including Subcontractors, or to any member of the public. When the City submits notice, Contractor shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this indemnity obligation. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

**30. OFFEROR'S QUALIFICATIONS**

The City reserves the right to request satisfactory evidence of any Offeror's ability to furnish services in accordance with the terms and conditions listed herein. The City further reserves the right to make the final determination as to the Offeror's ability to provide said services. We reserve the right to investigate the qualifications of any respondent under consideration, require confirmations of information furnished, and require additional evidence of qualifications to perform the work described in this Solicitation, contact references, and request an audited financial statement in order to determine a potential contractor's capabilities.

**31. ASSIGNMENT**

The Contractor(s) shall not assign in whole or in part its duties under the contract without the prior written consent of the City of Charleston. The Contractor shall not assign any money due or to become due to it under this contract without the prior written consent of the City of Charleston.

**32. SUBCONTACTORS**

- A) If any subcontractors shall be used for this project, the Contractor shall provide to the City's Director of Procurement a list of names of any of the intended subcontractors, the subcontractor's applicable license number(s), and a description of the work to be done by each subcontractor, if requested.
- B) The Contractor(s) shall not substitute other subcontractors without the written consent of the City's Director of Procurement.
- C) Contractor(s) shall be responsible for all services performed by a subcontractor. Responsibilities include, but are not limited to, compliance with any applicable licensing regulations.
- D) If at any time the City's Director of Procurement determines that any subcontractor is incompetent or undesirable, he shall notify the Contractor(s) accordingly, and the Contractor(s) shall take immediate steps for cancellation of the subcontract and replacement thereof with a subcontract that is approved by the City of Charleston.

- E) Nothing contained in any contract resulting from this Solicitation shall create any contractual relationship between any subcontractor and the City of Charleston.

33. **SUSPENSION OF WORK**

The City may order the Contractor in writing to suspend, delay, or interrupt all or any part of the Work for such period of time as the City may determine to be appropriate for the convenience of the City of Charleston, or for noncompliance with the contract requirements.

34. **TERMINATION**

- A) **For Convenience:** The City reserves the right to terminate the contract with the Contractor when it is in the best interest of the City, including, but not limited to non-appropriation of funds. If the contract is so terminated, the City shall provide the Contractor with a minimum of thirty (30) days written notice and shall compensate Contractor for all necessary and reasonable direct costs of performing the services actually accomplished as of the date of termination. No other costs shall be allowed for a termination for convenience. No damages shall be allowed for a termination for convenience.
- B) **For Default:** If the Contractor fails to comply with the terms of the contract the City shall notify the Contractor in writing of the specifics regarding such noncompliance. If the Contractor fails to begin to cure the noncompliance within five (5) days after the notice, the City may terminate the contract by written notice to the Contractor with a minimum of thirty (30) days thereafter and Contractor shall only be compensated for services actually completed prior to termination, contractor shall not be entitled to any costs or damages resulting from a termination under this section.

35. **MATERIAL AND WORKMANSHIP; WARRANTIES AND REPRESENTATIONS**

- A) If equipment, materials and supplies are to be a part of the service provided, all equipment, materials, and supplies incorporated in the work covered by the Proposal and provided by the Contractor(s) are to be new and of the most suitable grade for the purpose intended. Unless otherwise specifically provided in this Solicitation, reference to any equipment, material, supply or patented process, by trade name, make or catalog number, shall not be construed as limiting competition. When requested, the Contractor(s) shall furnish to the City for approval the name of the manufacturer, the model number, and other identifying data and information respecting the performance, capacity, nature and rating of the machinery and mechanical and other equipment which the Contractor(s) contemplates incorporating in the work. When required by this Contract or when called for by the City the Contractor(s) shall provide full information concerning the material or supplies which he contemplates incorporating in the work. Machinery, equipment, material and supplies installed or used without the required prior approval shall be at the risk of subsequent rejection.
- B) By signing its proposal, the successful Offeror(s) shall be deemed to have represented that its staff is knowledgeable about and experienced in performing the work required in this Solicitation and warrants that it shall use best skill and attention to provide the above described work in a professional, timely manner.
- C) The City may, in writing, require the Contractor(s) to remove from the work any employee the City deems incompetent, careless or otherwise objectionable.

**36. COMPLIANCE WITH LEGAL REQUIREMENTS**

All applicable Federal, State and local laws, ordinances, and rules and regulations of any authorities shall be binding upon the Contractor(s) throughout the pendency of this Project. The Contractor(s) shall be responsible for compliance with any such law, ordinance, rule or regulation, and shall hold the City harmless and indemnify same in the event of non-compliance as set forth in the Contract.

**37. PERMITS AND LICENSES**

- A) The Contractor(s) shall, without additional expense to the City of Charleston, be responsible for obtaining all necessary licenses and permits required by the State of South Carolina, or the City of Charleston or any other authority having jurisdiction.
- B) Contractors and subcontractors are responsible at all times for obtaining applicable work permits and licenses of any kind.

**38. DISPUTES**

Any bona fide dispute concerning the bid, proposal, request for qualifications or Agreement shall be resolved by the courts of the State of South Carolina. In the event any litigation is commenced with respect to any matter set forth in the aforementioned documents, the prevailing party shall be entitled to recover reasonable attorneys' fees and all other reasonable direct costs associated with such litigation from the non-prevailing party.

**39. STATE AND LOCAL TAXES**

- A) Except as otherwise provided, contract prices shall *include* all applicable state and local taxes.
- B) If applicable, two percent (2%) income tax withholding shall be withheld from each and every payment pursuant to Sections 12-8-540 and 12-8-550 of the *South Carolina Code of Laws* (1976, as amended) for certain out-of-state contractors, and such sums shall be paid over to the South Carolina Department of Revenue (the "SCDOR"). When and if the City receives an executed SCDOR Form I-312, Nonresident Taxpayer Registration Affidavit - Income Tax Withholding, such withholding shall cease.
- C) Contractor shall calculate that portion of the contract which is subject to the nine percent (9%) South Carolina sales and/or use tax, which amount shall be itemized and shown on all invoices, and shall be paid to the SCDOR by Contractor. If Contractor is a non-South Carolina company, the City shall withhold said amount from all invoices and remit payment to the SCDOR, unless Contractor furnishes City with a valid South Carolina Use Tax Registration Certificate Number.
- D) Contractor shall indemnify and hold harmless the City for any loss, cost, or expense incurred by, levied upon or billed to the City as a result of Contractor's failure to pay any tax of any type due in connection with the contract.

**40. INCORPORATION BY REFERENCE**

The contents of this Solicitation, including all drawings, attachments, specifications, exhibits, certificates, any addenda, Contractor's Proposal Response Form and Pricing List, and affidavits shall become part of the contract for this Project.

**41. PRIME CONTRACTOR RESPONSIBILITIES**

The contractor shall be required to assume sole responsibility for the complete effort as required by this Solicitation. The City shall consider the contractor to be the sole point of contact with regard to contractual matters.

**42. OWNERSHIP OF MATERIAL**

Ownership of all data, material and documentation originated and prepared for the City pursuant to this contract shall belong exclusively to the City.

**43. DRUG-FREE WORKPLACE**

(Note: This clause applies to any resultant contract of \$50,000 or more). The City of Charleston requires compliance with the South Carolina Drug Free Workplace Act. By submission of a signed proposal, you are certifying that you shall comply with this Act. See S.C. Code Section 44-107-30.

**44. FUNDING**

Offerors shall agree that funds expended for the purposes of the contract must be appropriated by the City of Charleston for each fiscal year included within the contract period. Therefore, the contract shall automatically terminate without penalty or termination costs if such funds are not appropriated. In the event that funds are not appropriated for the contract, the Offeror shall not prohibit or otherwise limit the City's right to pursue and contract for alternate solutions and remedies as deemed necessary by the City for the conduct of its affairs. The requirements stated in this paragraph shall apply to any amendment or the execution of any option to extend the contract.

**45. SUBMITTING CONFIDENTIAL INFORMATION**

For every document Offeror submits in response to or with regard to this Solicitation that is confidential or protected from disclosure, Offeror must separately mark with the word "CONFIDENTIAL" or "PROTECTED" on every page, or portion thereof. By so designating Offeror contends the information is exempt from public disclosure pursuant to the South Carolina Freedom of Information Act, S.C. Code Ann. §§ 30-4-10 through 4-165 (2007 & Supp. 2015) or other relevant law. For every document Offeror submits in response to or with regard to this Solicitation, Offeror must separately mark with the words "TRADE SECRET" on every page, or portion thereof, that Offeror contends contains a trade secret as that term is defined by the South Carolina Trade Secrets Act, S.C. Code Ann. §39-8-10, et seq. All markings must be conspicuous; use color, bold, underlining, or some other method in order to conspicuously distinguish the mark from the other text. Offeror shall not mark its entire Proposal (bid, proposal, quote, etc.) as confidential, trade secret, or otherwise protected! If a Proposal or any part thereof, is improperly marked as confidential or trade secret or protected, the City may, in its sole discretion, determine it non-responsive. If only portions of a page are subject to some protection, Offeror shall not be allowed to mark the entire page. By submitting a Proposal to this Solicitation, Offeror (1) agrees to the public disclosure of every page of every document regarding this Solicitation that was submitted at any time prior to entering into a contract (including, but not limited to, documents contained in a response, documents submitted to clarify a response, and documents submitted during negotiations), unless the page is conspicuously marked "TRADE SECRET" or "CONFIDENTIAL" or "PROTECTED," (2) agrees that any information not marked, as required by these bidding instructions, as a "TRADE SECRET" is not a trade secret as defined by the Trade

Secrets Act, and (3) agrees that, notwithstanding any claims or markings otherwise, any prices, commissions, discounts, or other financial figures used to determine the award, as well as the final contract amount, may be subject to public disclosure. In determining whether to release documents, the City shall detrimentally rely on Offeror's marking of documents, as required by these bidding instructions, as being either "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED." By submitting a Proposal, Offeror agrees to defend, indemnify and hold harmless the City of Charleston, its officers and employees, from every claim, demand, loss, expense, cost, damage or injury, including attorney's fees, arising out of or resulting from the City withholding information that Offeror marked as "CONFIDENTIAL" or "TRADE SECRET" or "PROTECTED."

**46. RECORDS RETENTION & RIGHT TO AUDIT**

The City shall have the right to audit the books and records of the Contractor as they pertain to this contract. Such books and records shall be maintained for a period of three (3) years from the date of final payment under the contract. The City may conduct, or have conducted, performance audits of the Contractor. The City may conduct, or have conducted, audits of specific requirements of this proposal as determined necessary by the City. Pertaining to all audits, the Contractor shall make available to the City access to its computer files containing the history of contract performance and all other documents related to the audit. Additionally, any software used by the Contractor shall be made available for auditing purposes at no cost to the City.

**47. COST**

Costs submitted with a Proposal shall be firm for a period of at least ninety (90) days from the closing date. All prices shall be firm-fixed type, unless stated otherwise.

**48. UNSUCCESSFUL OFFERORS**

Offerors not awarded a contract under this solicitation, may request return of their proposals within thirty (30) days after notification of award is mailed. All cost of returns shall be paid by the Offeror. If Federal Express, UPS, or other shipping number is not received with request, all materials shall be destroyed.

**49. PAYMENT FOR GOODS & SERVICES**

Payment for goods & services arising out of the contract resulting from this Solicitation and received by the City shall be processed within 30 days of receipt of a valid invoice.

**50. DISCUSSION/NEGOTIATION:**

By submission of a proposal, an Offeror agrees that during the period following issuance of a proposal and prior to final award of contract, the Offeror shall not discuss this Procurement with any party except members of the City's Procurement Division or other parties specifically designated in this solicitation.

**51. NON-DISCRIMINATION**

The Contractor(s) shall not discriminate against any individuals based upon age, sex, race, disability, religion, sexual orientation or gender identity and shall abide by the requirements contained in Federal Executive Order Number 11246, as amended, including specifically the provisions of the equal opportunity clause. The City's Equal Employment Opportunity Plan Utilization Report is available on the city website on the Human Resources and Organization Development page at <http://charleston-sc.gov/index.aspx?nid=246>. To receive a paper copy of the

report by mail, please contact Human Resources at (843) 724-7388. The successful Offeror will take affirmative action in complying with all Federal and State requirements concerning fair employment and treatment of all employees, without regard or discrimination by reason of race, color, religion, sex, national origin or physical handicap.

**52. DEFAULT**

In case of default by the Contractor, the City reserves the right to purchase any or all items in default in the open market, charging the Contractor with any excessive costs. Should such charge be assessed, no subsequent response will be accepted from the defaulting Contractor until the assessed charge has been satisfied.

**53. FORCE MAJURE**

The Contractor shall not be liable for any excess costs if the failure to perform the contract arises out of causes beyond the control and without the fault or negligence of the contractor. Such causes may include, but are not restricted to acts of God or of the public enemy, acts of the Governments in either its sovereign or contractual capacity, fires, floods, epidemics, quarantine restrictions, strikes, freight embargoes, and unusually severe weather; but in every case the failure to perform must be beyond the control and without the fault or negligence of the contractor. If the failure to perform is caused by the default of a subcontractor, and if such default arises out of causes beyond the control of both the contractor and subcontractor, and without the fault or negligence of either of them, the contractor shall not be liable for any excess costs for failure to perform, unless the supplies or services to be furnished by the subcontractor were obtainable from other sources in sufficient time to permit the contractor to meet the required delivery schedule.

**54. EXCEPTIONS AND DEVIATIONS**

Any deviation from specifications indicated herein must be clearly pointed out; otherwise, it will be considered that items offered are in strict compliance with these specifications, and successful Offeror will be held accountable. Deviations must be explained by accompanied documentation identifying and justifying all exceptions and deviations. Unidentified deviations found during the evaluation of the response may be cause for rejection.

**55. PROMPT PAYMENT DISCOUNT TERMS**

Prompt payment discount terms will be calculated from the point of complete order acceptance for services and/or commodities ordered.

**56. REJECTION**

The City reserves the right to reject any proposal that contains prices for individual items or services that are unreasonable when compared with the same or other proposals if such action is in the best interest of the City.

**57. ARBITRATION**

Under no circumstances and with no exception will the City of Charleston act as Arbitrator between the Contractor and any Sub-Contractor.

**58. GUARANTEE AND WARRANTIES**

The Offeror shall state his normal warranty and any extended warranties where available. Excluding any manufacturer's warranties and in addition to other warranties as provided by law or

herein, all labor and materials are warranted to be free from defects for a minimum period of twenty-four (24) months after the date of final payment by the City.

**59. PUBLICITY RELEASES**

Contractor agrees not to refer to any award of a contract in commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by the user.

**60. AMENDMENTS**

All questions and written responses, interpretations, corrections or changes to the RFP will be made by Addendum. Addenda will be mailed or otherwise delivered to all Offerors who have notified the City Procurement Division of receipt of the proposal.

**61. WITHDRAWALS**

Proposals may be withdrawn by written request received from the Offeror prior to the time set for opening of Proposals, but not thereafter.

**63. WAIVER**

The City reserves the right to waive any Instruction to Offerors, General or Special Provisions, General or Special Conditions, or specifications deviation if deemed to be in the best interest of the City.

**64. RESPONSE PERIOD**

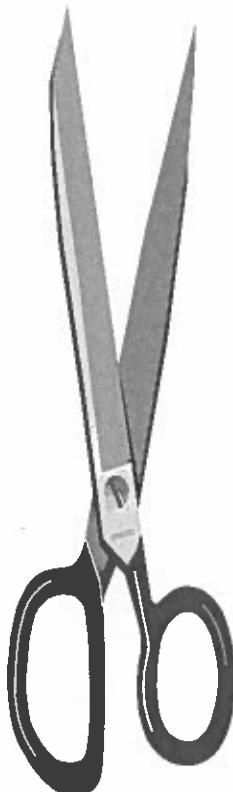
All responses shall be good for a minimum period of ninety (90) calendar days.

**65. CONTRACT TERMS**

The initial term of the Agreement shall be for one year. The City reserves the right to extend the Agreement if the City determines the extension is in its best interest; said extension will be on an annual basis and shall not exceed four (4) additional one (1) year periods.

**Cut along the outer border and affix this label to your sealed bid envelope to identify it as a “Sealed Bid”. Be sure to include the name of the company submitting the bid where requested.**

<b>SEALED BID • DO NOT OPEN</b>	
SEALED BID NO.: <b>24-P028R</b>	
BID TITLE: <b>Comprehensive Data Analytics System</b>	
DUE DATE/TIME: <b>November 5, 2024 @ 1:00 p.m. EST</b>	
SUBMITTED BY: _____ <b>(Name of Company)</b>	
DELIVER TO: <b>City of Charleston Procurement Division 75 Calhoun St., Ste. 3500 Charleston, SC 29401</b>	



## **Submittal Checklist**

Responses shall be mailed/delivered in a sealed envelope to the City's Procurement Division no later than and time as shown in this solicitation.  
<https://www.charleston-sc.gov/Bids.aspx?CatID=17>

Did an authorized company representative sign:

- The front page of this solicitation?
- The Certificate of Familiarity?
- The bottom portion of this page?

Did an authorized company representative sign the Certificate of Familiarity?

Did you include references if required?

Did you provide a copy of your Certificate of Insurance, if required?

Did you check the City's website for any addenda and include a signed copy of each with your response?

Did you complete and include pricing sheets, if included?

Did you double check to make sure you have included everything requested in this solicitation?

Payment Terms: <b>NET 30</b>	Federal ID/SS: _____	Unique Entity ID: _____
A/R Point of Contact (Name, Phone & Email): _____		
Company Legal Name & DBA: _____		
Remit to Address: _____		
Person Authorized to Sign: _____		Date: _____
Printed Name: _____		Phone: _____
Fax: _____		Email Address: _____

If you have any concerns, please do not wait until after opening to raise them. **At that point, it is too late. If this solicitation includes a pre-bid conference or a question & answer period, raise your questions during this time.** Please read the bid carefully.

**This checklist is included only as a reminder to help Bidders avoid common mistakes. Responsiveness will be evaluated against the solicitation, not against this checklist. You do not need to return this checklist with your response.**

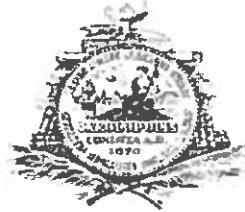
## EXHIBIT B

*City of Charleston*

*Procurement Division*

75 Calhoun Street, Suite 3500

Charleston, SC 29401



### ADDENDUM #1

T: (843) 724-7314  
F: (843) 720-3872

**DATE:** October 23, 2024

**TO:** All Bidders

**FROM:** Robin B. Robinson

**RE:** 24-P028R – Comprehensive Data Analytics System

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This addendum #1 to the solicitation is being made for the following reasons:

**The due date has been changed from November 5, 2024 at 1:00pm to November 19, 2024 at 1:00pm.**

If you have any questions, please feel free to call 843-724-7314. Thank you in advance for your cooperation.

---

Signature of Acknowledgement

---

Date

---

Company Name

**City of Charleston**  
**Procurement Division**  
**75 Calhoun Street, Suite 3500**  
**Charleston, SC 29401**



## ADDENDUM #2 Q&A

T: (843) 724-7314  
F: (843) 720-3872

**DATE:** November 1, 2024

**TO:** All Bidders

**FROM:** Robin B. Robinson

**RE:** 24-P028R – Comprehensive Data Analysis System

---

This addendum #2 to the solicitation is being made for the following reasons:

**1. Data Collection and Integration:**

- What are the main data sources that the Charleston Police Department (CPD) currently uses? Are they standardized across systems, or is there variability in formats and structures? **6 Enterprise level databases covering all LE needs and a number of access databases that supplement the others. There is variability.**
- Could you clarify any real-time data integration requirements? Is there a need for low-latency streaming or will batch processing suffice for most data sources? **Batch will suffice.**

**2. Data Storage and Management:**

- Do you have a preferred platform for data storage, such as on-premises or cloud-based solutions (CJIS certified), or should the vendor recommend the best solution based on project requirements? Do you currently have a data warehouse? **We will entertain best solutions. We do have a data warehouse though there will be need changes/restructuring.**
- What is the expected volume of data to be ingested and stored annually, and how should the system scale in terms of storage and processing capacity? **See Figure 1-A at the end of this document.**

**3. Analytics and Reporting:**

- Can you describe the current level of analytics being performed? What advanced analytics capabilities (e.g., machine learning, geospatial analysis) are priorities for CPD, and how should they be incorporated into the new system? **Currently geospatial**

- What kinds of reports and dashboards are required, and who are the main stakeholders (internal vs. public) who will access these? Are there any specific visualization tools currently being used? **Crime/Call/Compliance reports/dashboards with comparisons and geospatial representation. Both internal/external and all levels of the department (Admin/Command staff/patrol). Currently utilize entire ArcOnline suite, PowerBI.**
- How many users do you anticipate needing access to the reporting platform? **400-500 in a perfect scenario. 100 if paired down.**
- Do you currently utilize a Business Intelligence platform such as Tableau or Power BI?  
**PowerBI. ArcGIS online.**

#### 4. Security and Compliance:

- Regarding the role-based access control, how many user roles do you foresee, and what are the key distinctions in access levels between different groups? **400-500 users with 4 to 5 security levels to limit what can be seen based on already known security triggers.**
- Are there additional compliance standards beyond CJIS certification that we should account for when designing the system, particularly around data encryption and retention? **The system should mirror data in production datasets. Each dataset already has retention built in. If it exists in production it should exist in the data. If it is purged in production it should purge at next batch in the system. No specific encryption standard is currently specified.**

#### 5. Training and Support:

- Could you provide more details on the scope of training expected? Is the training focused solely on end-users, or will administrators also require technical training on system management and maintenance? **Depending on the solution it could be a mix of all. We will have power users that need to be able to create new reports/analysis and others that need to understand how the system works so that they can utilize the products.**
- What is the expected level of ongoing technical support and system maintenance? Are there specific Service Level Agreements (SLAs) that must be adhered to?  
**Will depend on the solution.**

#### 6. Project Management and Timeline:

- Could you clarify any critical deadlines or key milestones that must be met throughout the implementation phase? Are there specific events (such as quarterly reports or public presentations) that the system needs to be operational for? **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**

- Will the CPD assign an internal project manager or key liaison for day-to-day coordination, or should the vendor anticipate handling all coordination tasks? **Yes, there will be identified staff that will act as a liaison.**

**7. Current Pain Points and Priorities:**

- You mentioned data silos and the current challenge of data cleaning and preparation. Could you provide specific examples of how this affects operations? What types of data are the hardest to clean and analyze? **Needing to naturalize data across multiple datasets sometimes without a common identifier. Advanced joins, lots of SQL Views and high barrier to approachability for anyone outside of our analyst unit. Every dataset has its own challenges.**
- Are there specific metrics or KPIs the system should prioritize for CPD's decision-making processes? How do you currently track the success of your policing initiatives? **The solution should have the ability to pivot to answer any question that can be answered within any of our datasets. If we capture it, we should be able to extract it.**

**8. Budgetary Constraints and Total Cost of Ownership (TCO):**

- Do you have a set budget range for this project, or would you like the vendor to propose a solution with a flexible costing model? **Please present a solution and define the related costs.**
- What are your expectations for the total cost of ownership over the next 3 to 5 years, including licensing, maintenance, and potential system upgrades? **Please present a solution and define the related costs.**

**9. Can the proposal be submitted electronically or via email instead of mail (print copy)? **The City does not accept emailed proposals.****

**10. Is the city looking for a COTS solution or open to custom built solutions? **Open to either.****

**11. Has the city seen any COTS /Product demonstration in the past for the above? **Yes.****

**12. What is the award date and start date for this project?**

**The project is part of a 3-year federal grant, with an award date of October 2023. The start date would immediately follow the execution of the contract between the City of Charleston/CPD and the selected vendor.**

**13. What are the current deficiencies in the CPD Data collection? **More granular capturing of workflows that don't fit into a traditional LE system.****

14. What are the current storage systems that are limiting their ability to realize technology objectives? **No storage issues.**
15. What type of disparate data sources CPD has, how is the data being sourced? **Cloud based, file dumps, interagency networks, internal SQL databases.**
16. What are the different types of data sources and formats data is being sourced? **SQL Views, APIs, XML.**
17. What is the current tech stack of analytics (end-to-end)?
  - Data Collection – **Various enterprise solutions and in-house access databases.**
  - Data Integration – **SQL Scheduled processes, Arc Data Modeling, Access processes.**
  - Data Storage and Management – **SQL Server/MS Access**
  - Data Processing and Analysis - **SSMS/MS Access**
  - Data Visualization **ArcOnline/PowerBI**
  - Reporting **MS Access**
  - User Access and Security **SQL/Active Directory**
18. What are the current challenges of data cleaning CPD has? **Automation of more advanced workflows.**
19. Can you provide current data model w.r.t product creation of public a departmental stakeholder? **Could not answer based on how the question was phrased.**
20. Do you have a Data Governance in place? **Not at the level we would like.**
21. Will the system be used by external agencies or departments beyond the CPD? **No.**
22. What is the acceptable downtime for maintenance or system updates? **24 hrs.**
23. How should disaster recovery and data redundancy be handled? **Depends on the solution.**
24. What is the timeline for training new staff or transferring knowledge to internal IT teams? **Depends on the scope and complexity of the solution. Before the grant expires in September 2026.**
25. Are there any budgetary constraints or grant funding limits we should consider? **No. Present your best solution at the best rate you can.**

26. Is this a new requirement? If not, is CPD having any incumbent who is supporting CPD on this engagement? Can CPD share the names of incumbents? **Not a requirement. Strategic advancement.**

27. Are there any timelines in which CPD expecting vendor to deliver the solutions? **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**

28. Does CPD open to offshore and onshore combination? **Yes.**

29. What kind of security clearances are required to support this from vendors? **Basic CJIS Vendor certification.**

#### **Data Collection**

30. Under what circumstances should the data collection be created/have web-forms as inputs? **As needed.**

The following are a few additional sub-questions:

- Should it be a transaction-based system? **Yes**
- How many data points are envisioned? **Less than 50 for current project.**
- How detailed should the form be designed / developed? **Whatever is necessary to answer the needed questions for the project.**
- Is it in-scope of this application? **Yes**

31. What are the current volumes of data that are supposed to be housed in data analytics platforms? **See Figure 1-A at the end of this document.**

32. What are different sources and anticipated volumes of data? Could you please identify by data sources and frequency of ingestion? **See Figure 1-A at the end of this document.**

33. How many data sources are supposed to be real-time vs batch jobs processing? **All can be batch. If we were to set any up as real time only 1 source would be on that list.**

#### **Data Storage**

34. What are the current data storage solutions in place? **Enterprise data center attached storage to a VM Host.**

35. Should our resources get any CJIS clearances upon the award of the contract? If yes, what is the typical timeframe for getting such approvals? **Yes. 24/48 hrs.**

36. What is the certification requirement defined by CJIS for the storage solution On-Cloud? **Ultimately, this will be determined by the solution and level of PPI that is available on the cloud.**

37. What advanced analytics tools that CPD envision? **Ability to automate and easily visualize common data points. Also allow for data interaction and not just paginated reports.**

38. What kind of data quality framework is in place, what are the current state challenges? **No framework other than national requirements for reporting. We have internal processes tied to each dataset depending on its nuances but is a very manual process today.**

39. Does CPD have experienced support staff to run custom models and/or scripts using R or Python etc.? **Yes, though more training may be needed depending on complexity.**

40. How many custom scripts and models CPD have today? **Do not have an exact number. Every report or semi-automated process involving some scripting or modeling.**

41. Do you have high-availability (HA) systems for business continuity in place? **As much as feasibly possible with current limitations.**

42. Does CPD enabled with data naturalization? What kind of legacy data systems CPD has? **Will need help with naturalization. Solutions for various data elements have changed over time.**

43. What are the different agencies or departments CPD sources data from? **State/County**

**Data Visualization**

44. What specific geospatial data layers are to be incorporated into dashboards and reports? **Potentially all that are available currently on our SDE. Crime data, beats, neighborhoods, businesses...etc.**

45. What is CPD's expectation on geo-spatial representation for advanced analytics? **Clusters, hotspots, boundaries, cutting...**

46. Is CPD having a support team in place for Arc GIS layers? **Yes.**

47. Is CPD having a support system for self-service-based dashboards, charts, graphs etc. **Ability to create some, yes. Currently scalable, no.**

#### Reporting

48. How many reports are in place today? What is the frequency? **20+  
Weekly/Monthly/Quarterly/Yearly/One offs.**

49. How many new reports are expected? **However many are necessary. Hard to quantify.**

50. Do we have all the data sources identified for reports? Is data analysis and data sourcing required? **Sources are identified and known. Some level of analysis will be needed.**

51. How are the current reports being published? To the web-portal? We don't "Publish" in the traditional sense. Reports are emailed out manually. Anything outward facing in a web format is manually uploaded with the exception of one dashboard that is "published" via PowerBI.

52. Future state reports must be published to same web-portal or web-portal needs to be developed? **Yes. We would like the flexibility to publish anything as needed.**

53. What is the form of reports to be emailed to CPD users? Should it be as attachments or links from the system to be opened on the Portal? **Depends on the solution. Either are acceptable.**

#### User Access & Security

54. How many users access data analytics platform and how? Reports, direct access by SQL queries, model executors, dashboard users, other ad-hoc users? **Up to 500 will need access in some way. Number of users with direct access will be very small. Ideally will be some form of web driven interaction. Reports portal.**

55. What is the technology stack used for Active Directory (AD)? That is for the vendor to dictate. We have the ability to use Azure AD as well as on prem AD. Today we have used it with SQL server for access.

56. Does CPD have non-AD users who need access to CPD data? If yes, how are they enabled today for accessing reports/data? **Yes. There are public facing resources. Currently**

driven by manual uploads that are publicly shared. If it is automated it is internal processes with data access to update files that those resources are referencing.

57. Can CPD share the current state documents, architecture and other information? This helps us in assessing the technological stack that we can propose. **For most systems.**
58. Are you expecting full end-to-end operations support after the data analytics platform setup with the above ask? **Depends on the solution.**

**General questions:**

59. Do you have a vision for the solution's acceptance criteria? Please describe. **The solution must collect/synthesize agency data related to the project strategies. It must also allow for rapid analysis and graphical/geospatial presentation of those data to internal stakeholders and the public. The solution should offer those with direct access a way to create customized reports on an as-needed basis.**
60. What are your expectations regarding the project timeline? **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**
61. Would you consider multiple releases or an MVP (Minimum Viable Product) development approach? **Will consider either based on the solution proposed.**
62. Will any part of the solution implementation be handled by your team? Please describe your vision for each area of responsibility. This is important to ensure that no tasks are overlooked and that interdependencies between teams and timelines are clear:
  - Development of the overall solution architecture (data ingestion to visualization) (your team | **ScienceSoft**)
  - Environment configuration for solution implementation (your team | **ScienceSoft**)
  - Architecture implementation within the configured environment (your team | **ScienceSoft**)
  - Integration with external data sources and data ingestion into local storage (your team | **ScienceSoft**)
  - Development of analytical data marts for BI (dashboards, reports) (your team | **ScienceSoft**)
  - Development of dashboards and reports (your team | **ScienceSoft**)
63. Has any part of the solution already been implemented? (There was an "ETL packages implementation for City of Charleston Police Department" project completed by ScienceSoft before (June-July 2022)—can we assume its results are part of the requested solution?) **In relation to ScienceSoft. There are processes in place today that can be built upon but**

modifications would need to be made to those to address new needs that weren't part of the original scope.

**Architecture and data landscape:**

64. Do you have any specific priorities for the technological stack or cloud provider? Please specify. **Already outlined in the RFP.**
65. Are there any internal policies, technical restrictions, or compliance requirements for the solution implementation? Please describe. **Only compliance requirement is storage must be CJIS compliant.**
66. What systems and technologies will be connected to the solution, and in what order? Please list internal and external systems separately. **See Figure 1-A at the end of this document. Order will be dictated by the largest number of records in that table.**
67. Can you provide a list of entities from the defined data sources for consolidation into the platform? **To the awarded project. Yes.**
68. Can you estimate the data volume for each data source? What is the expected yearly growth? **See Figure 1-A at the end of this document.**
69. What type of data does each data source contain? Is it structured or unstructured? **Text/Integers only. Images/video exist but are not required to be brought into this solution. Both structured and unstructured.**
70. What are the data latency requirements (data delivery SLA)? For example, how often should data be pulled—real-time, daily, or hourly? **Depends on the source. 2 hourly, 4 daily.**
71. What are the security requirements for the target solution? Please specify layers like data access, functionality access, roles model, encryption, etc. **Would be role-based and encryption is encouraged but not required with the exception of any cloud stored CJI material.**
72. Will additional data sources, beyond the 4 available in your SQL Server, be added? **See Figure 1-A at end of this document as well as small access databases of negligible size/scope.**
73. Is there any existing specification/documentation for transformations, reports, or other aspects? **Some**

**74. Do you have any restrictions on cloud providers? Should be CJIS Compliant**

**Data analysis and reporting:**

75. What types of advanced analysis are required? Would you need ML (Machine Learning), predictive analytics, forecasting, or recommendation engines (for customers or internal use)? **At this time, we are not looking for any forecasting or predictive analytics.**

76. Can you provide a list of required reports or dashboards? Please describe their number and types. **These will be determined by the solution, but there will be several based on geographic areas as well as time frames.**

77. What is the expected functionality, complexity, and examples of each report/UI type? **These will be determined by the solution design.**

78. Do you have specific business rules and requirements for report delivery? **No, although we are looking for a dashboard/website format.**

79. What types of users will interact with the system/reports?  
o Should they have different access levels/permissions?  
o Are there specific security restrictions for certain users?  
o How many users are expected to work with the system in the future?  
**City employees/public. There would be role based security. Admins/power users would be less than 5 and internal interactions under 500 users. These will be determined by the solution design.**

**Data governance:**

80. Do you already have data governance or data management strategies in place? **Not at the level we would like.**

81. Insurance requirements, section D, clause 1:  
Could you please provide us with the information about number of estimated insured persons to count the cost for our Insurance Certificate amendment. **Contact your insurance carrier. The City of Charleston, as a governmental entity, would be the insured.**

82. Insurance requirements, section I:  
Could you please specify what shall we do with Certificates of Insurance: whether we shall ask our Insurance Agency to print certificates for each insured persons and entities? Who exactly shall sign all these certificates? **Contact your insurance carrier. The City of Charleston, as a governmental entity, would be the insured.**

83. Instructions to offerors, section 28 “Insurance requirements”

Could you please specify what was meant under this wording: “*The Contractor(s) shall also require any sub-contractors to carry the same coverages in the same amounts. Faxed Insurance Certificate(s) and Endorsement(s) shall be accepted if received no later than the time of contract execution and the original documents are received within one (1) business day after receipt of the fax transmittals*” Contact your insurance carrier. If you subcontract any of your work to a third party, they would be required to provide the same level of coverage to the City as an additional insured.

84. Instructions to offerors, section 55 “Prompt payment discount terms”

Could you please clarify the statement “*Prompt payment discount terms will be calculated from the point of complete order acceptance for services and/or commodities ordered*” – what are prompt payment discount terms? **Not applicable to this RFP.**

85. Could you please let me know when we should expect responses to both questions lists (technical and legal)? **As soon as feasible. The submission deadline has been extended to 11/19.**

86. Data Collection and Integration

- What types of data sources are expected to be integrated into the system (e.g., specific databases, third-party applications, cloud services)? (Ref: Page 9, Sections 4.1 and 4.2)
- Is there a preference for specific data formats (e.g., CSV, JSON) or APIs for real-time data ingestion? (Ref: Page 9, Section 4.2)
- How many unique data sources are expected for integration, and are there any proprietary systems involved?
- Will the City require integration with legacy systems, and if so, can you describe the current architecture of these systems? (Ref: Page 9, Section 4.4)

**See Figure 1-A at the end of this document for source info. No preference on format. Unique data sources no more than 7 but must support the 5 listed. Yes to integration for legacy systems. All legacy systems are SQL based.**

87. Data Storage and Management

- Is the City open to both on-premises and cloud-based data storage solutions, or is there a preference for one? (Ref: Page 9, Section 4.3) **Yes. No preference.**
- Can you provide an estimate of the expected data volume over the next 5 years to properly size storage needs? Can you specify the number of rows and total storage per source system? (Ref: Page 9, Section 4.3) **See Figure 1-A at the end of this document.**
- Does the City require CJIS (Criminal Justice Information Services) certification for cloud hosting, and if so, do you have preferred vendors? (Ref: Page 9, Section 4.3) **Ultimately, this will be determined by the solution and level of PPI that is available on the cloud.**

## 88. Data Processing and Analysis

- What specific types of analytics does the City expect to perform (e.g., statistical, geospatial, machine learning)? (Ref: Page 9, Section 4.4) **Statistical and Geospatial and Temporal required.**
- Are there any pre-existing analytics models or tools the City currently uses that would need to be integrated into this system? **No.**
- Can you elaborate on the specific data cleaning and preparation requirements mentioned, and what level of automation is expected for these tasks? (Ref: Page 8, Section 2) **Naturalization, common format, concatenating, normalizing, conversions...etc.**
- Are there specific geospatial tools (e.g., ArcGIS) or formats that must be supported for mapping and visualization? (Ref: Page 9, Section 4.5) **ArcGIS.**

## 89. Data Visualization and Reporting

- Can you clarify the requirements for dashboards, particularly the customization options expected for different user roles? (Ref: Page 9, Section 4.5) **Internal would have more granular data elements where a public facing dashboard would be higher level and less detail.**
- Are there specific reporting templates the City prefers, or will these need to be developed from scratch? (Ref: Page 9, Section 4.6) **We have templates we use but will probably develop new ones in this process.**
- Is there a need for multi-language support for the dashboards and reports, or is English sufficient? **English is sufficient for internal dashboards and reports. We would prefer English and Spanish language support for external dashboards and reports.**
- How frequently are reports expected to be generated, and is there a required frequency for scheduling automated reports? (Ref: Page 9, Section 4.6) **Depends on the report. Daily/Weekly/Monthly/Quarterly/Yearly or on demand.**

## 90. User Access and Security

- What are the specific security requirements for data encryption, especially in terms of compliance with state or federal regulations? (Ref: Page 9, Section 4.7) **Requirements can be found here: <https://le.fbi.gov/cjis-division/cjis-security-policy-resource-center>**
- How many distinct user roles do you anticipate, and what level of access will each role require? (Ref: Page 9, Section 4.7) **No more than 6. Will define in final project.**
- Does the City require integration with Active Directory for role-based access control, or are there other identity management systems in place? (Ref: Page 9, Section 4.7) **Preferred.**

## 91. Training and Support

- How many end-users and system administrators will need training? (Ref: Page 9, Section 4.8) **Depends on the solution. Admins less than 5. End users up to 60.**
- What existing knowledge or experience do end-users have with data and analytics capabilities? (Ref: Page 9, Section 4.8) **Assume end users have 0.**

- What level of training is expected for end-users and system administrators, and what is the preferred training delivery method (e.g., in-person, online, WBT, ILT)? (Ref: Page 9, Section 4.8) **Will be dictated by the complexity of the system.**
- Is there an internal training team that we will be working with? (Ref: Page 9, Section 4.8) **CPD does have an internal training team. Level of engagement will depend on solution.**
- What is the expected duration of ongoing technical support, and are there specific Service Level Agreements (SLAs) the City requires? (Ref: Page 9, Section 4.8) **Will depend on complexity of the solution.**
- Can you clarify the City's preferred process for support requests and incident management? **Your current process and how to address these issues should be part of the proposal.**

## 92. Project Timeline and Implementation

- Is there an expected timeline or deadline for the implementation of the system? (Ref: Page 10, Section 5.4) **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**
- What are the critical milestones or dependencies that need to be considered in the project plan? (Ref: Page 10, Section 5.4) **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**
- Will the City be providing internal resources to support implementation, and if so, in what capacity? **There will be identified staff that will act as a liaison and an internal training team that will be engaged based on the type of solution proposed.**

## 93. Cost and Budget

- Are there any budget constraints or funding cycles we should be aware of to help us appropriately structure the proposal? (Ref: Page 10, Section 5.5) **No, please submit the best proposal and provide the related costs.**
- Should the cost proposal include pricing for potential future system expansions or additional features? **Would be helpful. But should be broken out to reference future options/cost as not to be confused with current project totals.**
- Will the City require separate cost breakdowns for different phases of the project, such as discovery, implementation, and ongoing support? (Ref: Page 10, Section 5.5) **This would be helpful but is not required.**
- Is there a maximum budget for the project, and how should long-term costs (e.g., software licensing, support, and maintenance) be factored into the proposal? **Please submit the best proposal and provide the related costs.**
- Should the cost proposal include future system upgrades or expansions? **Please submit the best proposal and provide the related costs.**

## 94. Compliance and Certification

- What compliance or certification requirements (e.g., CJIS, state regulations) are mandatory for the proposed solution? (Ref: Page 9, Section 4.7) **CJIS**

- Can you confirm whether the City requires specific certifications for vendors or their personnel (e.g., MWBE certifications)? (Ref: Page 13, MWBE Compliance Provisions) **CJIS. There are considerations for MWBE.**

**95. Requirements Gathering**

- What stakeholders or departments will be involved in the requirements gathering process? **Research partners, CPD Personnel, Procurement, Grant.**
- Is there a preferred format or method for documenting the requirements (e.g., user stories, use cases, functional specifications)? **No preference.**
- How will the City ensure that all departments' needs are captured and aligned with the project objectives? **Internal stakeholders.**
- Are there any existing process flows or documentation that we should review to better understand current systems and requirements? **No. This solution isn't for one specific problem but a flexible system that can answer current and future questions.**
- What is the expected duration and timeline for the requirements gathering phase? **None determined.**
- Will workshops or joint application design (JAD) sessions be required to clarify and prioritize requirements? **Likely.**

**96. Testing (Unit Testing, QA, and UAT)**

- What are the City's expectations for unit testing, and are there specific tools or frameworks the City prefers for this stage? **No preference. Expectations will be to verify accuracy/ability of the solution to provide core requirements.**
- Will the City provide a dedicated team for Quality Assurance (QA), or is the vendor expected to manage the entire QA process? **Yes, CPD personnel will be involved in this process.**
- Can you describe the expected level of involvement of City staff in the testing process (e.g., testing scripts, review, and approval)? **Heavy on the review and approval. Possible interaction with script review depending on the solution.**
- Will the vendor be responsible for creating all testing documentation (e.g., test plans, test cases, defect tracking), or will this be a collaborative effort? **Collaborative.**
- How will user acceptance testing (UAT) be conducted? Will there be predefined criteria or KPIs that need to be met for the system to be accepted? **There are basic project goals that are outlined already that will need to be met.**
- How many rounds of UAT does the City anticipate, and what are the processes for addressing feedback from UAT sessions? **As many as it takes to meet basic requirements.**
- Are there any specific timelines or deadlines for completing QA and UAT, especially if there are dependencies with other projects? **No specific timelines as this depends on the solution proposed. The grant end date is in September 2026.**
- Does the City have a preferred issue tracking system for logging defects and enhancements discovered during testing phases? **No preference.**

## General Questions

### 97. User Licensing: How many internal users will need access to the system? **60 to 500**

- Total number of users who would need access to dashboards to consume (view, filter, interact) **Up to 500**
- Total number of users who would need to do ad-hoc analysis based on a published data source or dashboard **60 or less**
- Total numbers of users who would need ability to create dashboards **Less than 10**

### 98. Public-Facing Component:

- Do you have a need for public-facing dashboard functionality in the proposed system? **Yes.**
- How many users do you expect to regularly access the public-facing dashboards? Do you foresee any heavy public usage that would require additional capacity or security measures? **Our most hit resource garners around 6,000 views/yr.** [www.charleston-sc.gov/pdi/incidents](http://www.charleston-sc.gov/pdi/incidents)

### 99. Integration with Existing Systems:

- Could you provide more details on the existing data sources that need to be integrated (e.g., databases, flat files, external systems)? **See Figure 1-A at the end of this document.**
- Are there any legacy systems or specific tools we should be aware of for integration purposes? **Some access databases. Mostly SQL based with some FTP Flat file retrieval.**

### 100. System Scalability:

- Are there plans to expand the system or increase data volume significantly over time? If so, what is the projected data growth? **No significant increase.**

## Technical and Maintenance Questions

### 101. Maintenance and Support:

- What level of ongoing maintenance and support is expected? Should our team provide all the maintenance, or will this be handled by internal IT? **Depends on the design/complexity of the system.**

### 102. Updates and Upgrades:

- How frequently do you expect system updates (e.g., quarterly, annually)? Should our team provide automatic updates, or will this be handled by internal IT? **Depends on the design of the solution. Certain tasks can be completed by city personnel.**

### 103. Dashboard Development Scope:

- Can you confirm if dashboard development is a required part of the proposal? **Yes.**
- How many dashboards will be required initially, and what key data points or metrics should each dashboard display? **As many as necessary to meet the basic objectives of this project. This will be a fluid collaborative process.**

## Training and Documentation

### 104. Training Requirements:

- What level of training is required for internal users? Will you need additional training sessions for new hires or refreshers? **Will depend on the solution. Will not need a refresher for new hires.**
- How many users would need to be trained on the system during initial deployment? **Will depend on the complexity of the solution. As low as 60. As many as 100.**

### 105. Documentation Preferences:

- What kind of documentation (manuals, video tutorials, etc.) do you prefer for the system? Should it be tailored for different user roles (e.g., admins vs. basic users)? **Depends on the system. Documentation is more necessary for the administrative personnel at CPD tasked with maintaining the system. Training documentation can be tailored for the end user by city staff.**

## Performance Metrics

### 106. Performance KPIs:

- What are the key performance indicators (KPIs) or metrics you would like to track to assess the effectiveness of the analytics system? **These will be collaborative and iterative.**

## Budget and Timeline

### 107. Budget Clarification:

- Is there a specific budget limit or range for this project that we should be aware of? **Please present a solution and define the related costs.**

### 108. Timeline Expectations:

- Can you confirm the expected timeline for full system deployment? Are there any key deadlines for certain phases of the project **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**

## Other

### 109. Does the data platform environment need to be CJIS certified? **Yes.**

### 110. Any specific prioritized use cases the PD wants to tackle first in the development process? **Anything related to the grant that is funding this project.**

### 111. Level of confidence in the quality of source data. **Every data source is nuanced.**

112. Is there a data dictionary in the PD that is used to anchor to common terms. **CPD can assist with any needs pertaining to this. There is no singular data dictionary for each of our systems.**

113. Could you please clarify the requirement for the List of Qualifications and References? Specifically, do the four similar projects need to be completed entirely within the past three years, or would ongoing or older projects still be acceptable? Additionally, are there any specific criteria regarding the type of projects? **This solution is part of a federal grant, with a project end date of September 2026. Extensions must be requested and considered by the grantor and are unlikely to be approved. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**

- The RFP states that performance and payment bonds are required for a notice to proceed at #24 but doesn't specifically call out bond requirements. Payment bonding should not apply to use as we do not intend to subcontract. Will a performance bond be required?  
**The City is requesting a 100% Performance Bond from the awarded vendor.**
- The RFP does not list specific data sources and systems that the City/Police Department wish to integrate into the Comprehensive Data Analytics System. Is that list available? **See Figure 1-A at the end of this document.**
- To the extent a list of specific data sources and systems will not be made available prior to RFP submission, can vendors propose multiple pricing scenarios to cover different potential scopes of work (e.g., pricing that reflects a scope that involves fewer systems vs. pricing that reflects a scope with many more systems)? **Yes.**
- Will different weights be applied to the Proposal Evaluation Criteria Factors (Technical capabilities and solution fit, Vendor's experience and expertise, Project plan and implementation approach, Itemized Cost and overall value) or will each factor be weighted equally? If the former, what will those weights be? **That information is not available at this time.**
- Will the Evaluation and Selection Committee be staffed solely by representatives from the Police Department or will representatives from other City agencies/offices also be involved? **Solely by CPD representatives.**
- For offerors that are invited to present their proposals to the Evaluation and Selection Committee, will demonstrations of the solution be required or, minimally, allowed at that step? **Will be dictated by the solution. If demonstrations are possible it would be helpful.**
- For the requirement of "Ability to publish to an access controlled web portal," should this be understood to mean the ability for an existing web portal to receive/pull data from the solution via mechanisms such as an API? Or should this be understood to mean the ability for the solution to provide a new public facing web portal? **The idea is that both our internal and external customers would not require a software client but could interface with information from a web portal. Internally it would need to be secured and role based. Externally it would just be public resources with no access control needed.**
- For the requirement of "Ability to capture data, via a web-form, into a database for future analysis," are there specific types or data that the City/Police Department has in

mind that are not currently captured/collected via existing tools such as the RMS, CAD, or other data entry/storage solutions already in use? Yes, there are specific supplemental questions that cannot be captured in our traditional systems. We do not currently use another solution for this task. The city has used other solutions to capture via a basic form but not in a way that is integrated into an SQL database to automate analytics.

114. Could the City of Charleston please disclose the allocated budget for this contract? Please present a solution and define the related costs.
115. Does the City of Charleston have a preferred pricing format? If not, can firms use an Excel spreadsheet detailing milestones and the cost of each? No preferred pricing format. An Excel spreadsheet is fine.
116. Could the City of Charleston please provide the estimated date of the project execution? The project is part of a 3-year federal grant, with an end date of September 2026. The start date would immediately follow the execution of the contract between the City of Charleston/CPD and the selected vendor.
117. Does the City of Charleston accept offshore resources to execute the project? Yes.
118. Is it required to provide the Certificate of Insurance (COI) alongside the proposal response? It is preferred, but not required. The awarded vendor will be required
119. Could the City of Charleston please kindly grant an extension for the due date submission? The due date for submissions has been extended to 11/19/2024.
120. Could the City of Charleston please clarify whether digital signatures are permitted for signing the forms? Yes, docusign is acceptable.
121. Could the City of Charleston please clarify, if firms can provide commercial references? Yes.
122. Could the City of Charleston please clarify, if firms can provide references for ongoing contracts? Yes.

123. If the resources the vendors provide at the time of proposal submission are not available at the time of a potential contract award, could firms replace them with equally qualified resources? **This would depend on the situation.**

124. Does the City of Charleston accept remote resources to work on the project? **Yes. We have mechanisms to securely facilitate this.**

125. Does the City of Charleston prefer on-site resources to execute the project? **Depends on the solution. Any hardware considerations, yes. Software/Analysis development, not necessary.**

126. Is there a page limit for the proposal response? **No.**

127. Can the City of Charleston confirm whether subcontractors are permitted for this opportunity? **Subcontractors are allowed to work with a prime contractor.**

128. Are vendors permitted to use the subcontractor's references? **Providing references for the Prime and Sub are acceptable. Please note whose references are for who.**

129. Could the City of Charleston kindly clarify whether the MWBE goal can be met by a subcontractor? **Yes, if you are sub-contracting with an MWBE that is certified and you can provide documentation showing as such.**

130. Could the City of Charleston please clarify whether the 20% MWBE goal can be met solely by the prime being NMSDC MBE certified? **If the Prime is a certified WMBE firm, they would meet the 20% goal (+). They would be 100% WMBE if they intend to complete the total job/project by themselves.**

131. Could the City of Charleston please confirm that we can fill out proposal forms electronically? **Yes, you can complete the fillable sections electronically.**

132. In case firms are submitting confidential information in the response, is it required to provide a redacted version? **As described on pages 2, 22, and 45 please mark those sections/pages "Confidential".**

133. Can the City provide more details about the specific data silos currently in place? What systems or databases are used to collect and store the data? **See Figure 1-A at the end of this document. Currently we have a SQL instance that is housing copies of each dataset.**

134. What is the size of data in these data sources and how many years of data it contains? **See Figure 1-A at the end of this document. Number of years varies based on the system.**

135. Does CPD have any data source in the cloud (Azure/AWS/GCP)? **Yes.**

136. For data integration, does CPD is seeking a centralized repository (maybe a data warehouse)? If yes, does CPD have any preference for an on-premise solution or cloud solution (Azure/AWS/Snowflake)? **We currently have a solution that does this but are open to a complete overhaul and are open to both on-premise and cloud.**

137. Are there any specific state or local regulations that govern the collection and storage of data that we need to account for in the system design? **CJIS Security.**

138. How are datasets currently linked or bridged together? Is there an existing process or tool used for this integration? **Combination of SQL Views and Access nested queries/macros.**

139. Are there any particular data sources (internal or external) that must be integrated as part of this new system (e.g., incident reports, crime statistics, traffic data, etc.)? **See Figure 1-A at the end of this document.**

140. What specific challenges do you face with data cleaning and preparation (e.g., missing data, inconsistent formats, duplication)? **Common issues in data. Open text fields, unstructured data, conversions, common formats, naturalization. etc.**

141. Is there any existing process for automating data cleaning and transformation that bidders can build on, or would this be created from scratch? **We have some processes in place that can be modified but are also open to starting over from scratch.**

142. What are the most labor-intensive tasks in your current data preparation workflow? **Product creation and dissemination.**

143. Are there any specific tools currently used for data cleaning and preparation (e.g., Excel, SQL scripts, ETL tools)? **ETL processes built into batch SQL jobs, SQL views, Access macros, Excel, ArcGIS Data Models.**

144. Could CPD elaborate on the data models you envision for the analytics system? Are there any key performance indicators (KPIs) or metrics that should be central to the models?

**The solution should have the ability to adapt with our needs not just today but in the future.**

145. What types of advanced analytics are you aiming for (e.g., predictive modeling, trend analysis, anomaly detection)? **Trend analysis and anomalies.**
146. Does CPD require real-time analytics capabilities, or is this primarily for batch processing and scheduled reports? **Primarily a batch processing/scheduled reports.**
147. How does CPD currently analyze and interpret data, and what insights are you looking to gain from a more advanced analytics system? **Currently use partially automated process for common reports. Labor intensive processes for questions that deviate from the common day-to-day questions. Increase efficiency, consistency, and accuracy of products. The goal is to reduce the barrier of entry to our data for internal staff and the public.**
148. What kinds of reports and dashboards are most valuable to both your internal and external stakeholders? Can CPD provide examples of the types of data products you currently generate? **See [www.charleston-sc.gov/pdi](http://www.charleston-sc.gov/pdi) for examples.**
149. How many reports/dashboards CPD is looking for? Can CPD provide any information about the dashboard's complexity? **No set number. Complexity varies based on the question we are attempting to answer and the end users' ability to understand/use the products being developed.**
150. Are there specific data visualization tools or platforms CPD prefers (e.g., Power BI, Tableau)? **No preference. Currently have a footprint with PowerBI/ArcGIS.**
151. How frequently do reports and dashboards need to be updated and shared with stakeholders (e.g., daily, weekly, monthly)? **All of the above.**
152. What specific workflows are CPD looking to automate, and what processes are currently manual and time-consuming? **Daily/Weekly/Monthly/Quarterly/Yearly reports as well as the creation of dashboards to make information more interactive and accessible for drill down.**
153. What type of automation or scheduling capabilities are critical for improving the efficiency of data workflows? **Product creation and automated cleaning of common issues.**

154. Are there any specific pain points in the current process of creating and distributing reports that CPD hopes to solve with this new system? **Automation.**

155. What level of access do different stakeholders (both internal and public) require for reports, dashboards, and data? How will permissions and data security be handled? **Anything external will be considered “Public” and not secured. Internally will need to be role based to control who has access to what. The solution should factor in the need for access control. Active Directory would be preferred.**

156. Do external stakeholders require access to real-time data, or will periodic snapshots or reports suffice? **Will not need access to real-time data. Anything public will have at least a 1-week delay to allow for administrative approvals and corrections.**

157. Are there any legal or regulatory considerations regarding data access, sharing, and security that need to be accounted for? **Nothing outside of the CJIS Security needs.**

158. Can CPD provide more details about your current technology stack? What are the core systems, databases, and software platforms in use today? **Currently use SQL Server, SSMS, MS Access, MS, Excel, PowerBI and entire Arc Suite.**

159. Is there a preference for cloud-based vs. on-premise solutions, or any restrictions on the hosting environment? No preference. **Have to follow CJIS Security requirements.**

160. Are there any specific tools or technologies you expect the vendor to use for this project? **No.**

161. What level of technical expertise do your personnel currently have in data analysis, and what level of training would be needed to use the new system? **Varying levels of expertise. The level of training would be dictated by the complexity of the solution.**

162. Would CPD require ongoing training and support after the system is implemented, and if so, what format would be preferred (e.g., workshops, documentation, online courses)? **Will be dictated by the complexity of the solution.**

163. Are there any key concerns around change management as CPD transitions from the current system to the new comprehensive analytics system? **No.**

164. What is the timeline for this project? Are there any critical deadlines or milestones that bidders need to be aware of? **This solution is part of a federal grant, with a project end**

date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025.

165. What is the allocated budget for this project, and are there any specific grant requirements we need to take into consideration during proposal development? Please present a solution and define the related costs. Per the grantor's regulations, contractors must not be debarred, suspended, or otherwise excluded from receiving federal awards.
166. How does CPD envision this system evolving in the future? Are there any plans for expanding its scope, adding new datasets, or incorporating more advanced analytics capabilities down the line? Yes to all. We are always looking to incorporate more systems/techniques.
167. Will there be any future integrations with additional city systems or external law enforcement databases that we should account for in the system design? Given the relatively small size of these datasets any solution that is being spec'd we would be able to scale for additional integrations in the near future.
168. Can bidders use hybrid resources (Onshore/Offshore) for this project or do we have any restrictions? Yes, hybrid resources can be used.
169. Is the vendor required to complete Affidavits A and C if they will be using an MWBE? If the vendor will be sub-contracting with an MWBE, you are required to complete Affidavits A and B. Affidavit C is if you are self-performing the work.
170. Is it mandatory to include a Business License for the City of Charleston and South Carolina in the proposal response for the prime and the subcontractor? No, but you will need proof of licensure prior to award.
171. Relevant experience and case studies.- Could the City confirm if they will accept commercial experience in this section? Yes.
172. Summary of key benefits and unique features.- Could the City please confirm if the requirement is for the vendor or their proposed solution? The proposed solution.
173. If the prime and the sub do not possess a Business License for the City of Charleston or South Carolina, can the vendor submit proof of the application instead? Yes, but you will need proof of licensure prior to any award.

174. Is notarization required for Affidavit A, B, or C, depending on the vendor's submission? **The Affidavits do require notarization regardless of which one you use. If you are subcontracting with a WMBE, please include Affidavit A and B. If you are self-performing, please use Affidavit C.**

175. Could the City please clarify what information would they like to see in case studies? For example, duration or contract value? **We would be interested in seeing a summary of the project, its outcome, duration, and value. Please include any other information that would demonstrate the value of your work and how it is a good fit for this effort.**

176. Is it required to submit the pricing proposal in a separate envelope or document from the technical proposal in the physical copy, as is required for the electronic copy? **We prefer you submit your pricing proposal as a separate document at least on the electronic copy. If you place it in the bound copies, please use a separate tab.**

177. Is there any preference given to vendors located in or near South Carolina? If yes, what is the preference? **There is not.**

178. We are MBE certified by the Western Regional Minority Supplier Development Council. Does this certification qualify us for the MWBE participation, or should we seek subcontractors to meet the participation goal of 20%? **The City does not recognize the certification at this time. Please send a copy of your certification and please consider applying for certification with the City or SC Department of Transportation.**

179. What is the preference or evaluation points associated with MWBE Participation? **MWBE is not a part of the evaluation criteria. The City has set goals that we ask vendors to help us meet our goals by encouraging using W/MBE vendors, but it is not mandatory.**

180. We assume remote (within US) work is allowed. Please confirm. **Yes.**

181. Is Hybrid i.e., Onshore + Offshore acceptable? **Yes.**

182. We assume there is no onsite requirement for the key staff to be available for this project. Please confirm. **Dictated by the solution. If no new hardware is in the scope then remote work will suffice.**

183. How many vendors are you planning to select as a result of this RFP process? **One.**

184. Is the incumbent agency bidding on this RFP? Can you please confirm? If yes, can the CPD share the name of the incumbent agency? **This is a new solicitation for services. There is no incumbent.**

185. The evaluation criteria do not clarify the weightage points for the evaluation of the proposal against the sections. Would request the CPD to clarify the weightage points each section holds for evaluation of the proposal. **That information is not available at this time.**

186. We are assuming that the Certificate of Insurance is needed post-award of the Contract and not during the Proposal Submission. Please confirm. **The awarded vendor will be required to send a copy of their COI before the contract is completed, approved at Council and signed.**

187. We would request 2-week (Two week) extension for the proposal submission, So the vendor gets appropriate time to draft the proposal in detail based upon the clarifications received after QnA responses. Please consider. **The due date for submissions has been extended to 11/19/2024.**

188. Is there a specific pricing template which CPD can share, or can the Vendor share detail in its own format? **There is no specific pricing template. The vendor can use its own format.**

189. We assume this is a fixed price project. Please confirm. **Please present a solution and define the related costs.**

190. As per the RFP, we understand that the CPD requires the submission of the response via post, along with a USB flash drive. Could you please allow submission via email, to reduce the potential risk of delays or failures in postal delivery? This would ensure timely receipt. **The City does not accept emailed proposals.**

191. What does the estimated project start date? Are there any specific milestones or deadlines the CPD would like the vendor to adhere to? **This solution is part of a federal grant, with a project end date of September 2026. The start date would immediately follow the execution of the contract between the City of Charleston/CPD and the selected vendor. Ideally, the solution would be fully implemented by the 4th quarter of 2025.**

192. Can you please allow the use of digital or electronic signatures instead of Inked Signatures for the proposal submission? Please consider. **The City will accept docusign signatures.**

193. Can CPD share any specific challenges they faced with past data analytics systems or vendors that we should address in our proposal to ensure the project's success? To date, CPD has not had a true analytics "system" or vendor assisting in product creation. Everything has been in-house made with the use of common tools like Microsoft and ArcGIS products.

194. **CERTIFICATE OF FAMILIARITY** - what needs to be entered if we do not have "SC Sales Tax Number." Please place an "N/A" if you do not have a SC Sales Tax Number.

**Technical Questions:**

195. Please provide the overview of your current state architecture, tool stacks of your current technology landscape. SQL Servers, FTP flat file retrieval, SQL Views, ETL processes scheduled in SQL Server, MS Access Macros, Arc Data Modeling, PowerBi, etc.

196. Have you done any previous assessment / PoC for this initiative, please share details and any available outcome of the assessment /PoC? We know what is possible from current technologies owned by the city and have previously looked at analytical systems as part of normal due diligence of knowing what is available.

**197. Data Collection**

- a. Please elaborate on business use case for data collection We currently have a first attempt at a data warehouse that can be improved upon or built from scratch. The collection is from SQL Servers Direct DB Access, Web APIs, SQL Views, FTP Flat file retrieval...etc.
- b. What all data is required to be captured through web form? How many web forms to be developed? Approx. no, of fields and their type on each web form please elaborate. Are there any master data management, look-up, List of values etc. Please elaborate. Please provide sample existing forms which are being planned for digitalization. Still in development but would encompass what you have mentioned. Exact number of fields and forms is not locked down. We would expect any solution to be able to facilitate any number of forms/fields to meet the criteria of this project.
- c. Who will be submitting the data? Please elaborate approx. no. of users who will be submitting the data. Police officers. 450+
- d. What will be the frequency of data submission? Daily.
- e. What future analysis will be performed? Please elaborate. Dashboard/paginated reports representing the captured data that will join to other LE systems.
- f. How this activity is currently being managed? Please elaborate. ETL Processes scheduled in SQL Server.

**198. Data Integration**

- a. Please provide list of all source systems names, Provider/Vendor, purpose of source system, System Type (On-Prem / Cloud hosted / SaaS), method of data access (e.g. API,

CSV File, DB connection etc.), Size of each data base, approx. no. of rows & columns in DB, Approx. no. of tables in respective DB, frequency of data ingestion (e.g. Real-time / Batch i.e. Nightly, hourly) **See Figure 1-A at the end of this document. Batch.**

- b. What is the rough number of ETL Pipelines that need to be developed per Domain? How many domains are available in source systems? Please elaborate. **Will be collaborative exchange in the development process.**
- c. We assume that you will make available the relevant integration details, access, and data for ingestion / data import into data lake/DWH. Please confirm. **Yes.**
- d. Are there any other third-party vendors systems, applications, or services that need to be integrated or coordinated with this project? We assume integration related coordination from source system and related information shall be provided by CPD team. **No more than listed in Figure 1-A at the end of this document. We would facilitate any integrations.**
- e. Is the export of csv process carried out manually, or is it automated? **Currently any CSV export is manual.**
- f. Do you have an ER diagram explaining current Data models/systems? Please confirm and provide a copy of it. **No.**
- g. {Veracity} Need more details around Data Masking / anonymization requirements. Will there be separate curated Data layers for Internal & External users. Any specific Data Governance / Master Data Management / Data catalogue / Data Lineage requirements. Please elaborate. **There will be separate data layers curated for public/internal use. No requirements outside of CJIS security requirements.**
- h. {Variety} We assume data is structured in nature. Please confirm. If not, please provide different formats of unstructured data and data sources to be considered for the Project. **Do not currently ingest unstructured items though the ability would be helpful but not necessary.**
- i. {Velocity} We assume data to be available to be pulled in a batch mode from respective sources each day. Any requirements of Near Live data ingestion / reporting in future? **Batch should suffice.**
- j. What is the current monitoring, logging, alerting tools being used? Please elaborate. Depends on the system. **Each production box has built-in auditing and so does our SQL warehouse.**
- k. Please elaborate on how you envision and planning to do data extraction from existing systems, data scrubbing and pre-processing activities. What tool and techniques are being planned? **Up to the discretion of the solution being provided.**
- l. What are the current challenges you face with linking datasets across your systems? **Uncommon fields. Fuzzy matching.**
- m. Are there any existing ETL (Extract, Transform, Load) processes or tools currently in place? **Yes. Deployed on SQL Warehouse.**
- n. Do any data sources require specialized connectors or APIs for integration? **Yes.**

199. Data Storage and Management

- a. Please elaborate on current Data retention and archival policies. **Retention is based on individual systems.**
- b. What is the total volume of historical data to be loaded, including the specific years? **See Figure 1-A at the end of this document.**

- c. What is the expected growth rate of data over time (yearly, monthly)? **See Figure 1-A at the end of this document.**
- d. Is there a preference for on-premises vs. cloud storage? If cloud, are there specific CJIS-certified cloud providers already being considered? **No preference for either as long as CJIS-certified.**
- e. What is the required level of redundancy and replication for data? Please elaborate. **Complete. Daily Batch.**

#### 200. Data Processing and Analysis

- a. What specific types of advanced analytics are you looking to implement (e.g., predictive analytics, machine learning)? **Advanced methods are not required but accepted.**
- b. How will the system need to handle geospatial data analysis? Are there specific GIS tools currently in use? **Currently use ArcGIS. This solution would need to be able to reference existing layers from city SDE.**
- c. What level of automation is expected for the data cleaning and quality processes? **As complete as feasibly possible.**
- d. Are there existing data science models (Python, R scripts) in use, or will new models need to be developed from scratch? **New ones will need to be developed.**
- e. How will the system interface with legacy data systems for data harmonization? **However your solution dictates.**

#### 201. Data Visualization

- a. What specific visualization tools or platforms are preferred (e.g., Power BI, Tableau, custom-built dashboards)? **No preference. Currently have a footprint in PowerBI and Arc Suite.**
- b. Are there existing dashboards that need to be integrated into the new system or recreated? **Recreated, yes.**
- c. How many users will require access to dashboards, and will there be varying levels of permissions for different user roles? **Up to 500 and, yes, different roles.**
- d. What geo-spatial data representations are required? Are there any specific use cases where this is essential (e.g., crime mapping)? **Clustering, heat mapping, plotting, choropleth.**
- e. How frequently will dashboards need to update with new data? Should this be real-time or periodic? **Internal/Daily, External/Weekly.**

#### 202. Reporting:

- a. Do you have a centralized data repository or enterprise data warehouse today to build a reporting and business intelligence layer off of? Please elaborate on current state. **Yes, though a complete overhaul is also allowed. Currently a SQL Instance with replicated databases that include minor ETL processes.**
- b. Do you have semantic layer with consumable data models? **No.**
- c. What are you using for a data visualization and reporting tool today? Are there more than one? Please elaborate. How many existing reports are currently available?

**Access paginated reports, Power BI dashboards, ArcDashboards, Excel. 30+ common reports.**

- d. Will there be users outside of your team accessing data/reports? Please elaborate. **Yes. The public.**
- e. Do you require any embedding of reports or dashboards in web applications? Please elaborate. **Depends on the solution. A web interface to get to the product is required. Does not have to necessarily be nested in a separate application but does need to be web accessible.**
- f. Please provide list of reports to be developed as part of project. Please provide more detailed examples of the specific types of reports and dashboards you anticipate needing from the BI solution. **Solution will need to be flexible to facilitate any common needs. Map Layers/Charts/Graphs/Tables. Exact data elements should be irrelevant.**
- g. What is the total number of internal and external users utilizing these services? What is the maximum number of users expected to access and develop the reports? **500 inside unlimited external.**
- h. Is Geo spatial analysis required? If yes, to what extent? Please elaborate along with the business scenario. **Yes. Clustering, heat mapping, plotting, choropleth.**
- i. Have you assessed and identified the Power BI licensing you would like to go with for your users? Power BI provides multiple licensing options. Please confirm your preference. **Have not. Open to a mix of both if the solution requires it.**
- j. We assume that Business Logic, Transformation, Aggregation logics required for these reports will be provided by Customer Business Analyst. Please confirm. **Combination of vendor and internal analyst.**
- k. Please confirm that the Reporting software will only be in one language, which is English. **English is sufficient for internal dashboards and reports. We would prefer English and Spanish language support for external dashboards and reports.**
- l. Is Persona-Based data delivery required on Power BI Dashboards? **No requirement on supplier of visualization tool.**
- m. What is preferred approach for distribution of Power BI dashboards? Do you leverage Power BI Apps functionality? **Currently have no major footprint in Power BI.**
- n. How many report developer level user licenses do you envision for your team? **Less than 10.**
- o. Do you see any need for complex transformation, machine Learning algorithm uses requirement for the mentioned Transformation / reports? **Not required but helpful.**
- p. We request to share details about all the stakeholders and the target audience for the BI software solution who are going to use this. **Officers/Supervisors/Commanders/Executives/Public.**
- q. What type of reports are expected to be built; dynamic, static or both? **Both.**
- r. What should be the expected frequency of data synchronization (Hourly, every 30 minutes etc.)? **Daily**
- s. Do you expect the vendors to create standardized power BI report templates which can be further used for creating reports using organizational branding? **Not required but helpful.**
- t. How many subject areas are targeted for report development? Please list their names. **Solutions should be able to support any, irrelevant of data/area.**
- u. What is the maximum number of users that are expected to be accessing, developing the reports? **Accessing 500, developing less than 10.**

- v. On an average, please elaborate how many fields are expected on the PowerBI reports? **Report will dictate number.**
- w. How many reports are you looking to be developed as part of analytics, please elaborate. **As many as are necessary to meet departmental needs.**
- x. What is the preferred tool for reporting PowerBI / tableau? **No preference. Currently have a footprint in Power BI.**
- y. What are the specific reporting requirements for internal vs. external stakeholders? **Same for both. Internal will be more granular and detailed. External will be higher level.**
- z. How many different report templates are required, and will these need to be customizable by end-users? **As many as necessary. End user should be able to modify.**
- aa. Is there a need for automated report generation? If so, how frequently should reports be generated and sent? **Yes. Depends on the report.**
- bb. What compliance or security measures must be followed for the publication and sharing of reports? **Access level.**
- cc. How many users will require access to the reporting portal, and what are the role-based access requirements? **500 and a role will dictate the type of reports you have access to. An officer may not need to see a full team compliance report where their supervisor would.**

#### 203. Data Governance, Data Quality, Data Security

- a. Do you already have data governance/security framework that the vendor needs to follow? Please elaborate on current state. **No.**
- b. What level of sensitive data will be stored in system, & accessed by reports? Please elaborate. **Some items that contain items that fall under CJIS Security policy.**
- c. How would you rate the current data quality? Is the vendor expected to address any data quality issues? Please elaborate on the current state of data quality in the source system. Does the data require significant cleaning before it can be used in reports? **All data sets have nuances that have to be cleaned/addressed. The system dictates the level and assistance from the vendor that will be required.**
- d. What Data quality practices are you following today? How do you rectify data anomalies? Please elaborate. **Depends on the system/data element.**
- e. We assume that Data Governance effort is out of scope for this RFP. Please elaborate and confirm. **Correct.**
- f. Is there an existing Data Governance program in place? If so, what does it cover and what new requirements may exist? Have Data Owners and Data Stewards been identified? Please elaborate. **No.**
- g. From governance perspective, how many years of Data are you looking to store in the new Datawarehouse platform? Please elaborate. **Everything. Number of years is dictated by the source. As many as 16 yrs as few as 6.**
- h. Is master data management in scope? How do you match and merge records from different source systems? Please elaborate. **Yes. Currently ETL processes in place run nightly to a SQL Instance for replication/updating.**

#### 204. Environment, Access, and Connectivity

- a. Please elaborate on current Identity, Authentication, and Access Management System. Is it on-prem / Cloud based or Hybrid? Please elaborate. **Front end access is dictated**

by those systems. Back end access is also dictated by the system. Some SQL level, some AD, some SFTP.

- b. Please confirm on current connectivity mode between On-Prem and Cloud. **Current Data Replication is on-prem.**
- c. We assume all necessary software, reporting software, licensing, hosting services will be procured and provisioned by your Internal Team and provide access to vendor team for performing scope of activities in terms of configuration & implementation. **Depends on the solutions needs and specs. If it is software we already have agreements with and can procure under those agreements then yes.**
- d. Any peak usage periods or seasonal variations in data from Infra scalability point of view to be considered for Services? Please elaborate. **Level of variation isn't enough to impact these processes.**
- e. Please confirm how the vendor resources will connect and access the Customer Environment / systems. **We have a secure remote process in place that requires vendor registration and acts as a gateway to internal assets.**
- f. How do you currently manage data encryption and keys? Please elaborate. **Any encryption/keys that are in use were either configured or provided by third parties.**
- g. Please elaborate on your preference and rational for On-Prem based solution, Cloud Hosted Solution, COTS SaaS. **No preference.**
- h. Are you open for any innovative alternate solution & pricing as part of RFP response? Please confirm. **Yes.**
- i. Are you open for any non-Microsoft based solution? Please confirm. **Yes.**
- j. Are you open for a Custom build Solution hosted within your Cloud environment? Please confirm. **Yes.**
- k. Are there existing use case scenarios that requires some real-time analytics and access, which will force the data lake/Datawarehouse to be running 24x7? Please elaborate. **No.**
- l. What is the scale of expansion you are anticipating in terms of user base? It would be good to have the estimations for next 1 to 3 years and 4 to 7 years. **No more than 500 viewers internally. No more than 10 developers.**
- m. Please elaborate on the expected roles and permissions in the system for these users. **Officer/Supervisor/Commander/Executive/Public...**
- n. Do you have a presence in cloud technologies? If so, is it hosted on a Commercial Cloud or a Government Cloud? Please elaborate. **Not for this use case.**
- o. We are assuming that you have specific brand guidelines that we should adhere to while designing the user interface. Please confirm. **No. But can work collaboratively with solution to develop.**
- p. Will there be a need for multi-factor authentication (MFA) or other enhanced security measures? **Not required at this time. If tied to AD, we already have mechanisms to support it.**
- q. How should the system handle external (non-CPD) user access for public-facing data or dashboards? **If it's public, it's public. No levels for public-facing.**

## 205. Team, Program Management

- a. What is the current structure of your Data Engineering /Analytics / BI team, and do you foresee maintaining the same team structure after the proposed solution implementation? Please provide break up by role / responsibilities. **Product creation**

**and system management x 3 at CPD with a City IT department for backup as well as a full GIS department.**

- b. **What is the current total team size managing these Services in scope? Please elaborate on internal team expertise as well. Product creation and system management x 3 at CPD with a City IT department for backup as well as a full GIS department.**
- c. **How do you envision the coordination and communication between the Vendor and your team, particularly in terms of daily stand-up meetings and addressing approaches and roadblocks? Contacts identified on each side to meet as needed.**
- d. **Please elaborate on the customer teams / roles who will be participating in the project at various stages, including their locations and time zones. Also please confirm the level of engagement and the % availability of these personnel during project life cycle. To be identified once a solution has been identified as the solution will dictate the team and level of engagement.**
- e. **We assume CPD will be providing SME skillset on the existing business operations, data definitions and technical details of the current processes. Please confirm and elaborate. Yes. Solution will dictate the need and CPD will facilitate accordingly.**
- f. **How will tasks, issues and service requests be tracked and reported? Is there a dedicated ticketing system or helpdesk for reporting issues? Will vendor resource be getting access to this system? What is the current ticketing tool in use? Please elaborate each. No specific tool. Will go through designated SME's to report and work through with vendor.**
- g. **We assume detailed requirement specification & Business analyst will be made available by Customer for requirement elicitation and clarifications. Similarly, other relevant Business SMEs would be made available by Customer team. Please confirm. Correct.**
- h. **We assume that Customer team will be performing functional testing and User Acceptance Testing. Please confirm. Yes.**
- i. **What are you using the current Task / work management system? Where shall the project artefacts / documents be stored – please specify the tool name? Is there any review / approval tool in place for document sign-off, which needs to be followed by team? Please elaborate. No official customer system for this. Will manage as a group internally.**
- j. **What are some of the potential risks / issues which you could foresee for this project implementation? Please elaborate. No major concerns.**
- k. **What are some pain areas / improvements which you would like to achieve as part of the project? Please elaborate. Efficiency, consistency, accuracy.**
- l. **What are the timelines / anticipated duration of project expected by you? Please elaborate. This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**
- m. **How will the success of the project be measured? Please elaborate. The ability to capture, analyze and share information related to this project with internal and external stakeholders.**
- n. **What is the expected timeline for the initial rollout of the system, and are there any fixed deadlines driven by grant requirements? This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**
- o. **Are there any existing project management methodologies preferred by you (e.g., Agile, Waterfall)? No preference.**

- p. Will any dependencies on other departments or external vendors may affect the implementation timeline? **Depends on the solutions needs if they deviate from current workflows.**
- q. Are there critical milestones that must be met to secure ongoing grant funding? **No. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**

**206. Training:**

- a. We understand that there are no expectations for in-person trainings. Remote Virtual training sessions are allowed. Please confirm. **Virtual is allowed.**
- b. Please confirm anticipated duration of training / Knowledge Transfer and number of sessions required for your team. **Will depend on the complexity of the solution.**
- c. In terms of Training, please elaborate.
  - End-user training: No. of end users to be covered, No. of sessions to be conducted, duration of those sessions, Mode of those sessions – Online / Offline, Preferred method of delivery - Onsite / Remote **Will depend on complexity of the solution but either way remote should suffice.**
  - Train-the-trainer: No. of Trainers to be covered, No. of sessions to be conducted, duration of those sessions, Mode of those sessions – Online / Offline, Preferred method of delivery - Onsite / Remote **Will depend on complexity of the solution but either way remote should suffice.**
  - Online video training: No. of videos to prepared, what is your preference - Instructor led recorded sessions or Graphical / Animation Videos, Duration of the videos, expected format of video, do you have any Learning Management System / How do you plan to share these videos with the users? Do you need only end user videos or administration related videos as well. **Not sure this level will be necessary and can be developed in house if needed.**

**207. Ongoing Support and Maintenance Services:**

- a. What is the expected duration to be covered as part of post-go-live stabilization support? What are the expected support hours? How will Customer notify the issues? What is your preference in terms of On-site support during the post-go-live stabilization support period? **However long it takes to have a functional solution. Normal East Coast business hours for support. Notification through SME/Contacts on both sides. On-site shouldn't be necessary.**
- b. What are the expectations around support after the project? Will we transfer the knowledge back to client teams to operate the new system or will we need to consider an ongoing support model? Please elaborate. **Will be dictated by the complexity of the solution.**
- c. Could you please detail the scope for Ongoing Support and Maintenance Services? Please elaborate list of maintenance and support activities to be performed by the vendor along with frequency. **Will be dictated by the complexity of the solution.**
- d. Do you expect vendors to provide L2 & L3 support only? We assume that L1 support would be handled by your internal team itself. Can you please confirm? **Correct. CPD would handle L1 and some L2. Level will be dictated by the complexity of the solution.**

- e. Please elaborate on Customer current team size, technical capabilities, and familiarity with similar solution – which you envision to utilize for In-house support and maintenance. **CPD has 3 full time positions and a City IT department for further support.**
- f. We assume that you are looking for technical support only during Business hours, not 24/7. Please Confirm and specify the business hours along with time zone. **Correct.**
- g. What is the planned / envisioned volume of support requests for support you envision for Vendor on a monthly / weekly basis? **Will be dictated by the complexity of the solution.**
- h. Considering the resolution time of issue varies based on nature of the issue & type. Please provide your expectations in terms of SLA for response and resolution time. **Will be dictated by the complexity of the solution.**
- i. What are the expected response times for issue resolution? Are there defined SLAs for critical and non-critical issues? **Will be dictated by the complexity of the solution and nature of the problem.**

**208. Budget and Timeline rational:**

- a. Please share rational for arriving on timeline of 1 year for project. **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025. The grant requires concurrent implementations of strategies to reduce crime in identified hotspots. The solution needs to collect and analyze data related to these strategies.**
- b. Are there any existing software licenses that can be leveraged for this system (e.g., GIS tools, reporting 4.3tools)? **Have access to the full GIS suite. MS Enterprise Agreement.**
- c. What is the budget allocated for the project, and how is it divided across software, hardware, services, training, and support? **Please present a solution and define the related costs.**
- d. What are the expectations for the total cost of ownership over the next 3-5 years (including maintenance and upgrades)? **Please present a solution and define the related costs.**

**209. 2.1 What data do you want to collect?**

- 4.1 – 4.7      **What tools are you currently using or looking to use? Currently SQL/Access/ArcGIS/PowerBI/Excel. Looking to use anything.**
- 4.3               **Do you currently use Microsoft 365? Yes**
- 4.3               **Do you currently use PowerBI? Yes.**
- 4.3               **Do you currently use an analytics tool? If so, which one? Currently SQL/Access/ArcGIS/PowerBI/Excel.**
- 4.3               **Are you currently using Azure, AWS or Google or other Cloud provider for hosting your data? We currently have a solution that does this but are open to a complete overhaul and are open to both on-premise and cloud.**
- 4.8               **For Training and Support, what kind of training are you looking for? Train the training, Live webinars, On-demand videos, Custom videos? Will be dictated by the complexity of the solution.**

**4.8.1.1 Can the training be held remotely? If not how many days onsite would you like? Yes, it can be remotely.**

**210. What are you doing today? Does the data exist?**

**Access databases, SQL data warehouse, ArcGIS Data Modeling, and Excel to produce all reports/analysis through macros or manual compiling. Data exist for everything except items that need to be captured for this project supplement to RMS.**

**211. When will questions be answered? As soon as feasible. The submission deadline has been extended to 11/19.**

**212. Can you provide a comprehensive list of all existing data sources (e.g., databases, cloud applications flat files, third-party systems) that need to be integrated into the new analytics systems? What formats and protocols are used by these data sources (e.g., SQL databases, CSV, APIs)? See Figure 1-A at the end of this document.**

**213. What is the current IT infrastructure used by CPD, including existing on-premises and cloud systems? Do you have a specific architecture diagram that outlines how different systems and data are currently linked or siloed? SQL Instances and workflows to connect to other systems outside our network. ETL processes pull copies from production and house them in a warehouse. No full diagram.**

**214. What are the expected data volumes to be ingested, stored, and analyzed both now and in the future? Can you provide estimates on the current volume of data (e.g., terabytes per year) and anticipated growth over the next 5 to 10 years? See Figure 1-A at the end of this document and take into account that is everything from the last 16 years.**

**215. What are the common challenges with data cleaning and preparation in your current system? Are there specific data quality issues that need to be addressed (e.g., inconsistencies, incomplete records, duplicates)? Manual, tedious, time consuming and the usual suspects...duplicates, incomplete, conversions, linking disparate systems together...etc.**

**216. What are the current security measures in place to protect sensitive data (e.g., CJIS compliance, encryption methods)? Are there any specific internal or external compliance requirements (beyond CJIS) that need to be followed for the proposed solution? Nothing beyond CJIS. Nothing currently that needs to be disclosed in this initial process.**

**217. Can you provide examples of the types of reports and dashboards CPD users require? What specific KPIs, metrics, or geospatial analyses do stakeholders (internal and external)**

need to view on a regular basis? **Solution will need to be flexible to facilitate any common needs. Map Layers/Charts/Graphs/Tables.**

218. How many distinct user roles do you envision for the system (e.g., analysts, administrators, command staff)? What are the different levels of access required for these roles, and do they vary by data source or system functionality?  
**Officer/Supervisor/Commander/Executive/Admin/Public and will be applied to who can see what product.**
219. What specific types of data-driven decisions does CPD hope to improve with this new system? How do various stakeholder groups (e.g., command staff, patrol officers, external partners) intend to use the data for strategic and operational decision-making? **We'd like to measure the impacts of the grant-related, crime reduction strategies we develop. This will be beneficial for strategic planning and resource allocation. We'd also like to share better information with the community about these efforts and their impacts on public safety.**
220. Are there any legacy systems or databases that require special integration or custom connectors? How flexible is your current system in supporting new data sources, and are there any critical limitations we should know about? **Currently, most of our connectors are custom. We are only using an API for 1. The current system is extremely flexible.**
221. To what extent do you want data processing, cleaning, and report generation to be automated? Are there specific workflows or tasks that need to be prioritized for automation to reduce manual effort? **Anything that can be within reason should be. (Daily/Weekly/Monthly/Quarterly/Yearly reports) some daily dashboards.**
222. Do you have specific use cases or areas where custom analytics models or machine learning algorithms need to be developed (e.g., predictive policing, resource allocation)? What level of support do you require for custom script development (e.g., in Python, R)? **Certainly will have use cases but not a requirement for this project. If we did integrate these things assistance needed would be high depending on the solution.**
223. What level of training do your staff currently have in using data analytics systems, and what are your expectations for the training programs (e.g., length of training, specific skills to focus on)? Will you need ongoing support after the system is implemented, and if so, for how long? **Will be dictated by the complexity of the system.**
224. Do you have any critical milestones or deadlines for specific components of the project (e.g., data integration, dashboard creation)? Are there priority areas within CPD that

need access to the new system before others, and how flexible is the overall implementation timeline?

This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4th quarter of 2025. Extensions must be requested and considered by the grantor and are unlikely to be approved.

225. What are the data governance policies within CPD, and how do you handle data ownership, especially in share or public datasets? Are there specific rules for data retention, auditing, or user access that need to be enforced? There aren't official policies outside of normal LE considerations. Data retention is handled by each individual system. Auditing of some kind should be part of the solution. Data ownership is handled at the admin level in the agency. Today most officers/command staff do not have direct access to the combined data and have to go through individual portals to gather it themselves or wait for an analysis to aggregate.
226. Are there any existing vendor solutions or licensing agreements that must be considered or integrated into this project? Are there any budgetary or technical constraints that could affect how the system is deployed or maintained? Those will not affect this project. No technical constraints and there are always budgetary considerations but will be dictated by the solution provided and its estimated cost.
227. What is CPD's long term vision for the data analytics system beyond the initial implementation? Are there plans for expanding the system's capabilities in areas such as AI, predictive modeling, or enhanced real-time analytics in the future? The vision is always the same. Consistent, accurate, and timely information to drive decisions and resource allocation. CPD is always looking to do things better and more efficiently so if those additions provide value and are consistently helpful then they will be considered.
228. What is the allocated budget for this project, and how is it structured (e.g., implementation costs, licensing fees, support costs)? What internal resources (e.g., IT personnel, data analysts) are available to support the implementation, and what do you expect from the vendor in terms of post-deployment support? Please propose a solution and define the related costs.

## Data Collection

### 229. Data Input Methods:

- What are the specific formats and structures for data capture via web forms? Are there existing templates or forms we should adapt? Still in development. Exact number of fields and forms is not locked down. We would expect any solution to be able to facilitate any number of forms/fields to meet the criteria of this project.
- How often will data entry via these forms occur (eg. daily, hourly)? Daily

**230. Data Sources:**

- Can you provide a list of all current data sources that will be integrated into the system? **See Figure 1-A at the end of this document.**
- Are there any specific APIs or third-party tools that need to be supported for integration? **See Figure 1-A at the end of this document.**
- Are there any limitations or restrictions on how external data sources (like cloud services) will be connected? **Currently, most of our connectors are custom. We are only using an API for 1. The current system is extremely flexible.**

**Data Integration**

**231. Real-Time Data:**

- What are the latency requirements for real-time data ingestion? Is there an expected time frame for data updates to be reflected in the system? **Depends on the source. 2 hourly, 4 daily.**
- What kind of load (in terms of data volume) should the system be able to handle during peak times for real-time ingestion? **Real-time ingestion isn't required. Data size requirements can be calculated from the table attached Figure 1-A at the end of this document.**

**232. Batch Processing:**

- What is the batch processing frequency for different data sources (e.g., nightly, weekly)? Are there particular scheduling requirements for batch jobs? **Daily.**

**233. Legacy Systems:**

- What legacy systems need to be integrated? Will there be any specific challenges in connecting them? **See Figure 1-A at the end of this document for source info. Unique data sources no more than 7 but must support the 5 listed. All legacy systems are SQL based.**
- What is the current state of data cleansing in legacy systems? Will additional data cleaning tools be required within the new system? **We have some processes in place that can be modified but are also open to starting over from scratch.**

**234. Data Normalization:**

Are there predefined data normalization rules across various data sources, or will the offeror need to develop a strategy for this? **Should include a strategy for this.**

**Data Storage and Management**

**235. Data Volumes:**

- What is the expected volume of data over the next 5-10 years, and how should the system scale to accommodate this growth? **See Figure 1-A at the end of this document.**

- What data retention policies must be followed (e.g., data storage duration, deletion policies)? There aren't official policies outside of normal LE considerations. Data retention is handled by each individual system.

**236. Hosting Preferences:**

- Is there a preference between on-premises versus cloud-hosted storage, and if cloud is preferred, is there a specific provider (e.g., AWS, Azure) that should be used? We will entertain best solutions.
- For cloud-hosted solutions, are there any jurisdiction-specific requirements, such as CJIS certification? Should be CJIS Compliant

**237. Administrative Access:**

How many CPD admins will require full access to the system, and what specific administrative tasks should they be able to perform? Admins/power users would be less than 5. They are tasked with maintaining the system.

**Data Processing and Analysis**

**238. Advanced Analytics:**

- What specific use cases for advanced analytics (machine learning, geospatial analysis) does CPD have in mind? Can you provide examples of desired outcomes? Currently geospatial and temporal. No machine learning though it would be helpful. Currently cross analyze multiple datasets to produce common picture analysis.
- Are there any existing analytics models or scripts that need to be migrated, or will all analytics models be developed from scratch? New ones will need to be developed.

**239. Data Quality:**

- Are there any specific data quality issues currently faced by the CPD, and what types of tools are needed to address these? Specific issues include processes that are manual, tedious, time consuming and the usual suspects...duplicates, incomplete, conversions, linking disparate systems together...etc. All data sets have nuances that have to be cleaned/addressed.
- How should the system handle missing, inconsistent, or duplicated data during data preparation? Would depend on the dataset. Scenario.

**Data Visualization**

**240. Visualization Customization:**

- What level of customization is required for dashboards? Should users be able to fully design their own dashboards, or will predefined templates suffice? Internal would have more granular data elements and can design dashboards where a public facing dashboard would be higher level and less detail and would have no dashboard design ability.

- Which CPD departments or roles will need customized visualizations, and what are their specific visualization needs? All units/divisions within the CPD. Depends on their specific focus areas.

**241. Geospatial Data:**

- Can you provide details about the types of geospatial data to be visualized? Are there specific GIS layers or systems (e.g., ArcGIS) that need to be integrated? Potentially all that are available currently on our SDE. Crime data, beats, neighborhoods, businesses...etc. ArgGIS must be supported.
- What level of interactivity (e.g., zoom, layer selection) is required for the geospatial visualizations? Zoom and layer selection, date and crime type filters.

**Reporting**

**242. Reporting Frequency:**

- How frequently should automated reports be generated and distributed (e.g., daily, weekly)? Depends on the report. Daily/Weekly/Monthly/Quarterly/Yearly or on demand.
- What are the critical metrics or KPIs that CPD needs to see in reports, and are there any compliance reports required by the Department of Justice? The solution should have the ability to pivot to answer any question that can be answered within any of our datasets. If we capture it, we should be able to extract it. The selected vendor is not required to submit compliance reports to the Department of Justice but would be required to adhere to the stipulations in the contract with the City of Charleston.

**243. Report Customization:**

- What level of customization will end-users require for report templates? Should they have the ability to design and modify reports themselves, or will this be handled by system administrators? System administrators would design and modify the reports.

**244. Access to Reports:**

Will different stakeholders (internal vs. external) need access to different types of reports, and if so, how should access control be implemented? 400-500 internal users with 4 to 5 security levels to limit what can be seen based on already known security triggers. Externally it would just be public resources with no access control needed.

**User Access and Security**

**245. Role-Based Access Control:**

- How many user roles will be required, and what types of permissions should each role have? 400-500 internal users with 4 to 5 security levels to limit what can be seen based on already known security triggers.

- Are there existing user directories (e.g., Active Directory) that must be integrated for authentication. **Active Directory would be preferred.**

**246. Compliance:**

Are there specific encryption standards or compliance frameworks (e.g., CJIS, HIPAA) that must be followed when storing or transmitting data? **Should be CJIS Compliant**

**Training and Support**

**247. Training Needs:**

- What level of training will CPD personnel require (e.g., basic system use, advanced data analysis)? Will different user groups (e.g., admin. vs. end-users) require separate training sessions? **Depending on the solution it could be a mix of all. We will have power users that need to be able to create new reports/analysis and others that need to understand how the system works so that they can utilize the products.**
- Are there any specific formats to training materials that are preferred (e.g., in-person, online tutorials, documentation)? **Will be dictated by the complexity of the system.**

**248. Ongoing Support:**

- What are the expectations for system maintenance and support after the initial deployment? Will ongoing system updates be required, and if so, at what frequency? **Will depend on the solution.**
- What is the process for reporting and resolving system issues or bugs post-launch? **Your current process and how to address these issues should be part of the proposal.**

**Implementation and Timeline**

**249. Project Milestones:**

- Are there any critical deadlines or milestones (e.g., project phases) that need to be met during the implementation process? **This solution is part of a federal grant, with a project end date of September 2026. Ideally, the solution would be fully implemented by the 4<sup>th</sup> quarter of 2025.**
- Will there be a phased deployment, and if so, which functionalities need to be prioritized in the early stages? **Would be determined throughout the project.**

**Budget and Costing**

**250. Budget Constraints:**

- Is there a maximum budget for the project, and how should long-term costs (e.g., software licensing, support, and maintenance) be factored into the proposal? **Please propose a solution and define the related costs.**
- Should the cost proposal include future system upgrades or expansions? **Yes, we will consider those.**

251. If we are able to identify a MWBE company to team with us, do we still need to submit Affidavit A in addition to Affidavit B?  
**If you will be doing all of the work yourself, you will need to complete Affidavit C.**

252. Can we include MBE as a teaming partner to satisfy the 20% sub goal or it must be a MWBE?  
**If you are going use a MBE as a sub-contractor, you will need to complete Affidavit A and B. If your teaming partner works for your firm, then you cannot use them as a sub, therefor you would use Affidavit C.**

253. Can you confirm the following statement is correct?  
*“Bidders must provide either (a) Affidavits A and B or (b) Affidavit C. If a Bidder provides Affidavit C, the Bidder does not need to provide Affidavits A or C.”* **If you are providing Affidavit C, you will not need to provide Affidavits A and B.**

254. Will the City accept electronic notary like Notarize.com? **No.**

255. Do we need to include Certificate of Insurance as part of the submission? **That would be helpful, but it will be required from the awarded vendor upon contract negotiations.**

256. For “Relevant experience and case studies”, is there a minimum and maximum number of case studies we are required to provide? **Please provide at least one case study but include as many as necessary to fully demonstrate how you can best meet our needs.**

257. Do we need to provide Audited Financial Statements within our response? If yes, please confirm under which section we should include it.  
**The City reserves the right to request this information, but we are not requesting it with the proposals at this time. We hold our right to request it from either shortlisted or awarded vendor.**

258. Is the City referring to the front page of the solicitation form as a cover page? If yes, does that mean the offeror does not need to use the company’s cover page?  
**This is the City’s cover page of the RFP. You can use your company’s cover page if you wish, but you will need to include the City’s RFP cover page with the section you have for forms that need to be signed.**

259. If Prime Contractor is not MWBE certified, can offeror use it’s subcontractor’s MWBE certificate? **Yes, if you are sub-contracting with an MWBE that is certified and you can provide documentation showing as such.**

**Figure 1-A**

System Number	Total Records	Total Storage (GB)	Yr_Record_Inc.	Yr_Storage_Inc(GB)	Data_Format
1	6,741,391	5.56	861,810	0.53	SQL Views
2	97,539,804	28.53	6,502,654	1.9	Direct SQL
3	15,072,836	0.67	1,674,760	0.07	Cloud API
4	3,878,264	1.16	646,377	0.19	Flat File Ingest from SFTP
5	1,303,329	0.51	81,458	0.03	Direct SQL
<b>Total</b>	<b>124,535,624</b>	<b>36.43</b>	<b>9,767,059</b>	<b>2.73</b>	

## EXHIBIT C

### INSURANCE REQUIREMENTS

Contractors working for the City of Charleston are required to procure and maintain for the duration of their contract with the City insurance against claims for injuries to persons or damages to property which may arise from or in connection with work performed by the Contractor, his agents, representatives, employees or Subcontractors. The cost of such insurance shall be the responsibility of the Contractor.

- A. The Contractor shall carry liability insurance with a reliable company licensed to do business in South Carolina. Coverage shall be at least broad as:
  1. Insurance Services Office Commercial General Liability Coverage Form ("occurrence") CG 00 01 10 93.
  2. Insurance Services Office Business Auto Coverage Form CA 00 01 6 92 covering automobile liability, code 1 "any auto".
- B. Contractor shall carry workers' compensation as required by the State of South Carolina and Employers Liability insurance (including applicable occupation disease provisions and all state endorsements.)
- C. Contractor shall maintain limits no less than the following:
  1. **GENERAL LIABILITY:** \$1,000,000 combined single limit per occurrence for bodily injury, property damage, and personal injury with a \$2,000,000 general aggregate limit.
  2. **AUTOMOBILE LIABILITY:** \$1,000,000 combined single limit per accident for bodily injury and property damage.
  3. **WORKERS' COMPENSATION:** Statutory limits are required by South Carolina state law, and employer's liability limits of \$100,000 per accident.
  4. **PROFESSIONAL LIABILITY:** \$1,000,000 per claim/\$1,000,000 aggregate limit, with a deductible of \$20,000.

Contractor shall obtain and maintain a professional liability insurance policy covering the performance of the professional services specified in this agreement. Evidence of such insurance shall be satisfactory in form and content to the owner, the City. This coverage shall be maintained through the duration of this project and for a minimum of 1 year after substantial completion of the project as determined by the City.

The Contractor and any of its subcontractors will cause the professional liability insurance required in this paragraph C.4:

- (a) to be excess insurance over any project professional liability policy, and
- (b) to be primary insurance in the event the project insurance described in Paragraph E is canceled or not maintained, in the event the policy's limits of liability are exhausted, or if the policy expires.

D. Required policies are to contain, or be endorsed to contain, the following provisions:

1. General Liability and Automobile Liability Coverages

The City of Charleston, its officials, employees and volunteers are to be covered as additional insureds as respects: Liability arising out of activities performed by or on behalf of the Contractors; premises owned, occupied or used by the Contractor; or automobiles owned, leased, hired or borrowed by the Contractor. The coverage shall contain no special limitations on the scope of protection afforded to the City of Charleston, its officials, employees or volunteers. To accomplish this objective, the City of Charleston shall be named as an additional insured under the Contractor's general liability policy by attaching Insurance Services Office Commercial General Liability Endorsement CG2010 10 93 (Additional Insured - Owners, Lessees or Contractors - Form B) or its equivalent. Contractors' insurance coverage shall be primary insurance as respects the City of Charleston, its officials, employees and volunteers. Any insurance or self-insurance maintained by the City of Charleston, its officials, employees, or volunteers shall be in excess of the Contractor's insurance and shall not be required to contribute. To accomplish this objective, the following wording should be incorporated in the previously referenced additional insured endorsement.

Other Insurance: This insurance is primary, and our obligations are not affected by any other insurance carried by the additional insured whether primary, excess, contingent or on any other basis.

Any failure to comply with reporting provisions of the Contractor's policies shall not affect coverage provided to the City of Charleston, its officials, employees or volunteers.

2. Workers' Compensation

The Contractor shall agree to waive all rights of subrogation against the City of Charleston, its officials, employees and volunteers for losses arising from work performed by the Contractor for the City of Charleston.

- E. Any deductibles or self-insured retentions shall be the responsibility of the Contractor.
- F. Each insured policy required by the City of Charleston shall be endorsed to state that coverage shall not be suspended, voided, canceled by either party, reduced in coverage or

in limits except after thirty (30) days prior written notice has been given to the City of Charleston.

- G. All coverages for Subcontractors shall be subject to all the requirements stated herein.
- H. Insurance must be placed with an approved insurance company with current Best's rating of A+, A, or A-. Exceptions to this requirement must be approved in writing by the Department of Risk Management.
- I. Contractor shall furnish the City of Charleston with Certificates of Insurance noting the endorsements. The Certificates and endorsements for each insurance policy are to be signed by a person authorized by that insurer to bind coverage on its behalf. All certificates and endorsements are to be received and approved by the City of Charleston, Procurement Division, before work commences. The City of Charleston reserves the right to require complete, certified copies of all required insurance policies, at any time.

Required certificates should be mailed to:

City of Charleston  
Procurement Division  
2 George Street, Suite 3600  
Charleston, SC 29401

## **EXHIBIT D**

# Comprehensive Data Analytics System

## RFP No : 24-P028R



Our mission is to be a trusted digital partner driving transformational outcomes for our customers, while empowering our employees to achieve their full potential - unlocking Infinite Possibilities with Technology.

**We leverage technology to digitally transform organizations.**

**Proposal Submitted by**

**Siddharth Chaudhry**

Director, Sales & Client Partner

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Version 1.0

Dated: 14/Nov/2024



Dallas | Washington DC | New Jersey | Canada | London | Poland | Ireland | Singapore | Dubai | Hyderabad | Gurgaon | Pune

## Table of Contents

Executive Summary.....	4
Overview.....	4
Company Background & History.....	6
Why Kellton?.....	7
Relevant Work Experience & Case Studies.....	8
Data Modernization for a Financial Services Organization.....	8
Data Infrastructure Modernization.....	9
Revolutionizing Police Case Documentation.....	12
Migrating Legacy Data Warehouse to Snowflake for Enhanced Performance and Scalability.....	14
AI-Powered Federal Grant Processing Solution.....	16
Streamlined Data Management for Real Estate.....	18
Business Need.....	20
Need Statement.....	20
Statement of Work.....	20
Our Understanding.....	22
Current Landscape.....	23
In-Scope.....	24
Out of Scope.....	25
Guiding Principles.....	26
Solution Approach.....	27
Technical Architecture.....	30
Proposed Solution 1: Cloud-Based (Recommended).....	31
Proposed Solution 2: On-Premises.....	33
Comparison of Cloud-Based and On-Premises Solutions.....	35
Critical Success Factors.....	35
Pros and Cons.....	36
Our Recommendation.....	37
Environment Setup.....	38
Key Dependencies.....	38
Key Assumptions.....	39
Project Plan.....	40
Phase 1: Assessment and Planning.....	40
Phase 2: Data Ingestion and Integration Setup.....	40
Phase 3: Data Storage and Processing.....	40
Phase 4: Reporting and Visualization.....	40

Phase 5: Security, Governance, and Compliance.....	41
Phase 6: User Training and Support.....	41
Project Timelines, Milestones & Team Structure.....	42
Key Project Milestones.....	42
Project Timelines.....	43
Team Structure.....	43
Project Management Methodology.....	46
Engagement Cost.....	51
Client References.....	52
Appendix A : Our Processes, Frameworks & Methodologies.....	55
Appendix B : Accelerator Frameworks.....	64
Appendix C : Azure Monthly Licensing Cost Estimate.....	67
Appendix D : Proposed Training Model.....	69
Appendix E : Proposed Application Support Model.....	70
Appendix F : About Kellton.....	72

## Executive Summary

Kellton is pleased to propose a state-of-the-art, CJIS-compliant data analytics solution to meet the Charleston Police Department's (CPD) operational & strategic needs. The proposed solution combines robust data integration, scalable processing, and intuitive visualization to improve CPD's decision-making, resource allocation, and boost overall public safety.

Kellton is a globally recognized technology leader with 2000+ employees in offices around the globe. Led by industry veterans, our Data and Analytics practice is experienced in architecting & successfully executing large-scale data engineering & analytics projects. We're uniquely positioned to build CPD's Data Platform that brings together data collection, integration, storage, analytics, visualization, and reporting.

### Overview

We understand that CPD's objective is to empower decision-making, enhance operations; and drive strategic initiatives by harnessing their data. This is best achieved through a robust Data Platform. Naturally, this requires CPD to have an organized data ecosystem that can be leveraged to gain insights. With the current landscape, CPD is encountering the following challenges:

- Process-driven repeatability in cleaning data & extracting insights from it: this affects
  - Speed (turn around time)
  - Accuracy (errors in compiling data - which then requires additional resource time to review)
  - Access (role-based availability of insights being made available to stakeholders)
- Effort involved: the current manual way of creating reports is very laborious & error-prone, with a poor effort-to-outcome ratio.

### Proposed Solution

The right combination of technology, process and governance is crucial to addressing CPD's requirements. The following factors were considered deeply in our approach:

- Integration across CPD Systems: a cohesive data environment enables meaningful insights;
- CJIS Compliance and Robust Data Security: safeguarding sensitive law enforcement data is crucial;
- High-Quality Data Management: ETL processes to ensure data consistency for quality reporting;
- Data Storage Architecture: scalable raw data storage in tandem with a reporting database
- Intuitive and Accessible Reporting Dashboards: derive actionable insights out of complex datasets;
- Data Governance & Training: empower CPD teams with both: governance policies & ease-of-use;
- Focused Project Management: Well defined roles, milestones & reviews to ensure smooth delivery;
- Sustained Support and System Optimization: ensure on-going effectiveness & adaptability.

With these in place, we evaluated two important technology approaches: cloud-based & on-premises. We recommend a CJIS-compliant, cloud-based model hosted on Azure; keeping in mind benefits involving scalability, manageability, cost & compliance.

## Key Benefits

The solution integrates advanced data acquisition, integration, analytics and visualization to provide actionable insights for the CPD. Some of the key features & benefits of our solution are outlined below:

**Improved Operational Efficiency:** The proposed solution automates the data process from collection through analysis, enabling CPD to optimize patrol patterns, reduce response times, & allocate resources. With integrated crime mapping and trend analysis, CPD can significantly improve public safety and operational efficiency.

**Data Democratization:** A high quality data environment enables CPD to make data available to all stakeholders directly and securely. This puts data & insights in the hands of end users based on their role.

**Accelerator Enhanced Platform Development:** The codification of senior consultants' knowledge is a core principle of how Kellton creates value for its clients - we streamline time consuming processes to decrease cost and improve quality of execution. While we leverage accelerators in all phases - from ideation to sustenance - a particularly important one for this project is the Data Quality (DQ) accelerator, as we understand that DQ issues are currently burdensome to CPD. The goal of applying the accelerator is to improve the trust in the data, free up resources and to enable further data democratization.

**Data-Driven Decision Making:** This platform empowers officers and decision-makers with evidence-based insights by unifying & harnessing law enforcement data. This reduces the reliance on instinctual decision-making, helps mitigate bias & supports transparent & accountable policing practices.

**Scalability and Flexibility:** The solution is designed to grow with the needs of CPD. We leverage best practices in design & architecture to adapt to CPD's potential future requirements including new data sources, new analytics, AI etc.

**Security & Compliance:** The platform prioritizes security, ensuring that all sensitive data is protected through encryption, user authentication, and compliance with relevant privacy laws (e.g., CJIS).

**Integration with Existing Systems:** The platform integrates with existing systems to minimize disruption and maximize adoption. Officers can continue to use familiar tools while benefiting from the power of advanced analytics and actionable insights.

**Cost Efficiency:** We advocate saving costs with the use of automation in both development & operations. The modular pricing structure offers flexibility for departments to pick feature sets that best fit their budgets while delivering immediate ROI through increased efficiency and reduced crime rates.

**Proven Impact:** As can be seen in the case studies provided, Kellton's proven "performance improvement" design approach and execution methodology delivers tangible performance impact. We partner with our clients to identify and deliver measurable performance improvement.

In conclusion, this proposal offers a comprehensive, secure, and efficient analytics solution that empowers law enforcement agencies to leverage data for smarter, more effective policing. The platform addresses all critical buying criteria, ensuring it delivers measurable benefits in terms of efficiency, security, scalability, and cost savings, while enhancing community safety and trust.

## Company Background & History

**Kellton** is a globally recognized leader in technology consulting and digital transformation. Headquartered in India and publicly listed on the country's two major stock exchanges (BSE and NSE), Kellton has a global team of 2000+ employees spread across North America, the UK, EMEA, and APAC regions. Kellton is an ISO 9001:2015, CMMI Level 5, and SOC2 compliant organization. Established in 2009 by Niranjan Chintam and Krishna Chintam, the name 'Kellton' is inspired by the founders' alma mater, the Kellogg School of Management and Wharton School of Business.

Known for its leadership in technology, employment, and corporate responsibility, Kellton's work has garnered recognition from industry bodies, technology partners, and the media, worldwide. We've been recognized and awarded by prestigious institutions like Zinnov Zones (Leader in ER&D 2022), ISG Provider Lens™ Report (Product Challenger in the SAP ecosystem for the mid-market segment in 2023), Forbes (Best under a Billion), The Webby Awards (Best Data Management Category), and many more.

In addition to our technological initiatives, Kellton is deeply committed to corporate social responsibility, focusing on community improvement and poverty alleviation. The company's CSR activities include engaging in social development through self-help groups, supporting income generation, and fostering rural community development. In education, Kellton provides scholarships and endowments to various institutions. Our CSR initiative, "Reaching Out," aims to enhance the wellbeing of deprived community members by supplying basic necessities, with our employees actively participating in the annual drive.



Diagram 1 : Kellton's Global Presence

We build cutting-edge digital solutions, helping organizations create and sustain digital innovation across verticals, including Banking & Financial Services, Insurance, Healthcare, Education, Travel & Hospitality, Retail & Ecommerce, Manufacturing, Chemicals, Energy & Utilities, Oil & Gas, Governments, UN Agencies, Nonprofits, and Independent Software Vendors.

We've established strong partnerships with clients across North America, the UK, EMEA, and APAC regions, leveraging over a decade of expertise in digital transformation. Our collaborations, such as the

ongoing work with the World Food Programme since 2018, demonstrate our commitment to rapidly delivering specialized solutions. Additionally, our efforts with NATO in developing the ISMERLO system and with UNICEF in creating the HOPE web app highlight our capability in managing complex, mission-critical systems that significantly enhance operational capabilities & save lives. Besides large intergovernmental organizations, Kellton also serves a broad array of Fortune 1000 companies and global clients, along with governments at the state & local levels.

Our extensive portfolio encompasses multi-million-dollar projects, from single to double-digit millions, demonstrating our ability to undertake and successfully execute initiatives of varying scales. The relentless pursuit of excellence sets Kellton apart as a beacon of innovation and a trusted partner in the digital transformation journey.

#### Why Kellton?

- **Kellton's migration & discovery accelerators** streamline data migration by automating schema conversion, applying proven frameworks for planning and validation, and enabling repeatable, efficient data transfer with built-in quality checks. These tools reduce manual effort, minimize errors, and support consistent, scalable migrations across complex data environments.
- **Proven Methodologies & Expertise:** We have extensive experience executing similar projects, backed by proven methodologies & successful implementations that ensure success & innovation. Our execution approach ensures complete transparency to our solution design and execution steps.
- **Strong Platform and Product Engineering Focus:** We are known for our strong platform and product engineering pedigree, placing dedicated emphasis on delivering exceptional design experiences that elevate user engagement and satisfaction. Our Platform engineering focus and experience spans large-scale application platforms as well as data and analytic platforms.
- **Global Standards, Local Excellence:** We adhere to global industry standards for cutting edge technologies, while tailoring our service delivery to geo-specific and locally relevant needs.
- **Comprehensive Technology Services:** Our comprehensive technology service offerings are designed to meet both current requirements and future initiatives, ensuring scalability and sustainability in a rapidly evolving digital landscape.
- **Platform and Tool Partnerships:** We have diligently developed partnerships and experience in state-of-the-art tools and platforms to ensure we are able to deliver the best solutions to our customers. E.g., in the Data and Analytics space, we have developed expertise in Azure Data platforms, AWS, Snowflake, Actian, Cloudera etc.
- **Access, Attention, Agility:** As a right-sized company, we provide unparalleled access, attention, and agility, enabling swift decision-making, better service, and proactive support throughout our engagement. CPD will be a significant customer to us.
- **Trusted Digital Partner:** We always have your back. Our clients count on us for our responsiveness, flexibility, collaborative culture and commitment to excellence. We have delivered successful engagements in both the public and private sector.

Partnering with Kellton ensures not only technical excellence and innovation but also a collaborative approach that prioritizes your success and long-term business objectives.

## Relevant Work Experience & Case Studies

At Kellton, we have significant experience building similar solutions. Some examples are shared below.

### Data Modernization for a Financial Services Organization

#### Project Overview

Our Client (a South Carolina headquartered, publicly listed consumer lending organization with annual revenue of about half a billion dollars) embarked on a comprehensive data modernization project to transition from their legacy data environment to a new, cloud-based Enterprise Data Warehouse (EDW). This initiative aimed to eliminate architectural instabilities, ensure consistent and reliable data across the business, and enhance overall data governance and performance. The project involved the establishment of a new EDW, the migration of all reporting and analytics, and the restriction of access to legacy data sources.

#### Problem Statement

- **Data Inconsistencies:** Disparate data locations and multiple versions of truth hinder accurate metrics and reporting.
- **Performance Issues:** Complex queries for basic analysis and performance impacts on production systems.
- **Lack of Central Repository:** Data scattered across legacy data warehouses and loan system source tables.
- **Multiple Truths:** Inconsistent data leading to varied metrics across business units.
- **Governance and Security:** Unsecured workarounds and lack of consistent data definitions.
- **Quality and Performance:** Integration failures and direct querying of production databases posing risks.

#### Solution Provided

##### Data Modernization Program:

- Objective: To operationalize a modern cloud-based data platform for client's data, reporting, and analytics initiatives.
- Corporate Data Mart (CDM): Designed to streamline data access, solve common data needs, and provide a single source of truth for analytics.

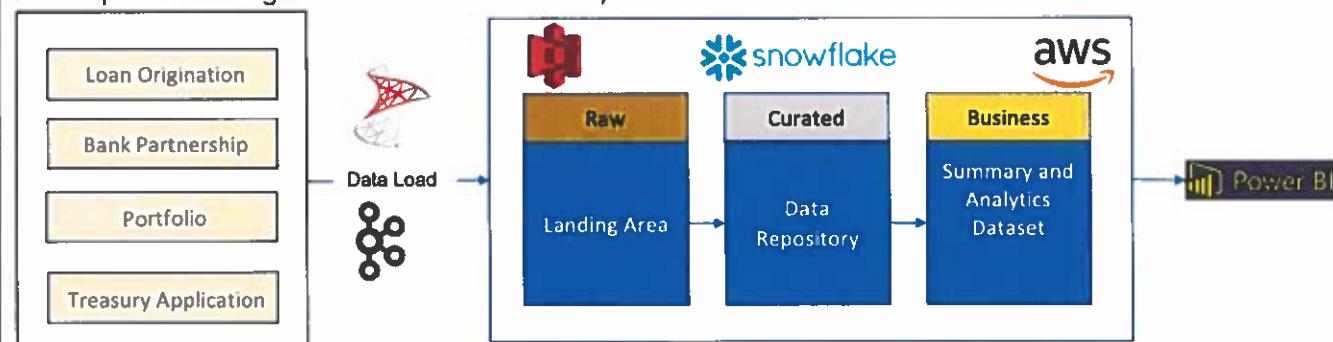


Diagram 2 : Technical Architecture of Data Modernization

#### Key Components:

- 1. Enterprise Data Warehouse (EDW):**
  - a. Centralized Data: Consolidates data into logical business entities.
  - b. Standardized Views: Creates business-friendly views following the loan lifecycle.
  - c. Source System Integration: Incorporates data from NLS, Web Platform, Provenir, DMS, and Marketing Campaign Data.
- 2. Corporate Data Mart Approach:**
  - a. Self-Service Analytics: Promotes self-service analytics with standardized data.
  - b. Streamlined Reporting: Simplifies query writing and report creation.
  - c. Business Unit Specific Marts: Custom-tailored data marts for each business unit.
- 3. Data Architecture:**
  - a. Logical Database Components: Defines entities, attributes, relationships, and constraints.
  - b. Data Analysis: Analyzes table structures, column names, keys, and relationships.
- 4. Snowflake's Enterprise Data Warehouse:**
  - a. Cloud-Based Approach: Scalable, efficient, secure, and provides better insights.
  - b. Workload Flexibility: Supports data analysts, BI, data scientists, and engineers.
  - c. Data Vault Model: Organized by logical business entities and source system agnostic.

#### **Business Outcomes**

- Consistent Data: Centralized data repository ensures consistent and reliable data.
- Improved Performance: Enhanced platform for better batch execution and reporting performance.
- Cost Efficiency: Reduced operational and data center costs with a cloud-based approach.
- Scalability: Flexible and scalable platform supporting long-term strategic goals.
- Enhanced Security: Best-in-class cybersecurity measures with encryption and redundancy.
- Better Insights: Improved data access compatible with leading-edge analytic tools.

The data modernization project for this client successfully addressed legacy infrastructure challenges, standardized data governance, and enhanced reporting capabilities. By transitioning to a modern, cloud-based EDW with Snowflake, the client now benefits from a scalable, secure, and efficient data platform that supports their strategic and long-term goals.

#### **Relevance**

This project demonstrates our expertise in migrating on-prem legacy data systems to cloud-based platform- Snowflake, ensuring reliable data accuracy and improved performance. We successfully transitioned the client to a Snowflake from SQL Server, aligning with the goals of scalability. Our experience in data platform modernization is directly relevant to the requirement of this proposal.

## **Data Infrastructure Modernization**

### **Project Overview**

Our client, a leading global manufacturer of tires, wanted to automate the stock and sales reporting. Current manual process or effort intensive and error prone. This project aimed at streamlining the process of data acquisition, processing and reporting.

### **Problem Statement**

The client wanted to modernize their data infrastructure to support data-driven analytics and insights, essential for competitive performance in the automotive industry.

The existing data infrastructure was fragmented, limited in scalability, and lacked efficient tools for real-time data analysis. They aimed to consolidate data from various sources and transform it into actionable insights, requiring an integrated cloud-based Data & Analytics solution. The primary objectives included implementing a scalable data mart, real-time reporting, enhanced data integration, and user-friendly interfaces, leveraging Azure's comprehensive cloud infrastructure.

### **Solution Provided**

To address client's requirements, a tailored Azure-based Data & Analytics solution was designed and implemented, which included:

- Azure Cloud Infrastructure: A robust environment using Microsoft Azure's computing, storage, and analytics services to provide a scalable and secure data foundation.
- Data Sources and Storage:
  - Azure Blob Storage was configured as a central landing zone for data ingestion from various sources, including ERP exports, partner datasets, and third-party data providers like ALM Kuwait, EUT UAE, and others.
  - Data from multiple categories, including their Dataset, PPM, Customer Product Offerings, and Partner Datasets, was consolidated and stored.
- Data Integration and Processing:
  - Azure Data Factory (ADF) was implemented for efficient data integration and transformation, automating ETL workflows and preparing data for analysis.
  - Azure Serverless Functions managed event-driven processing, handling data validation, cleansing, and pre-processing to streamline data readiness for reporting.
- Data Storage and Management:
  - Azure SQL Database served as the core DataMart, organizing data in layers: RAW, Stage, and DataMart. This structured approach ensured data traceability and enabled seamless transitions from raw data to actionable analytics.
  - Azure Key Vault was implemented for secure management of credentials and sensitive information across services.
- Reporting and Dashboard:
  - Microsoft Power BI Service provided a rich visualization layer, connected to the DataMart layer for real-time data analytics and custom reporting. This empowered them to create detailed, interactive dashboards for monitoring metrics.
- User Interface and Processing Automation:
  - A user-friendly Angular-based front-end interfaced with a Python Flask backend, allowing data upload, updates, and configuration.

- Azure Event Hub and Azure Logic Apps were used to automate notifications and handle workflow triggers, ensuring that data processes were dynamically adjusted based on real-time conditions.
- Security and Compliance:
  - The Azure environment was secured through Azure Security features, including role-based access control, encryption, and compliance with data governance policies.

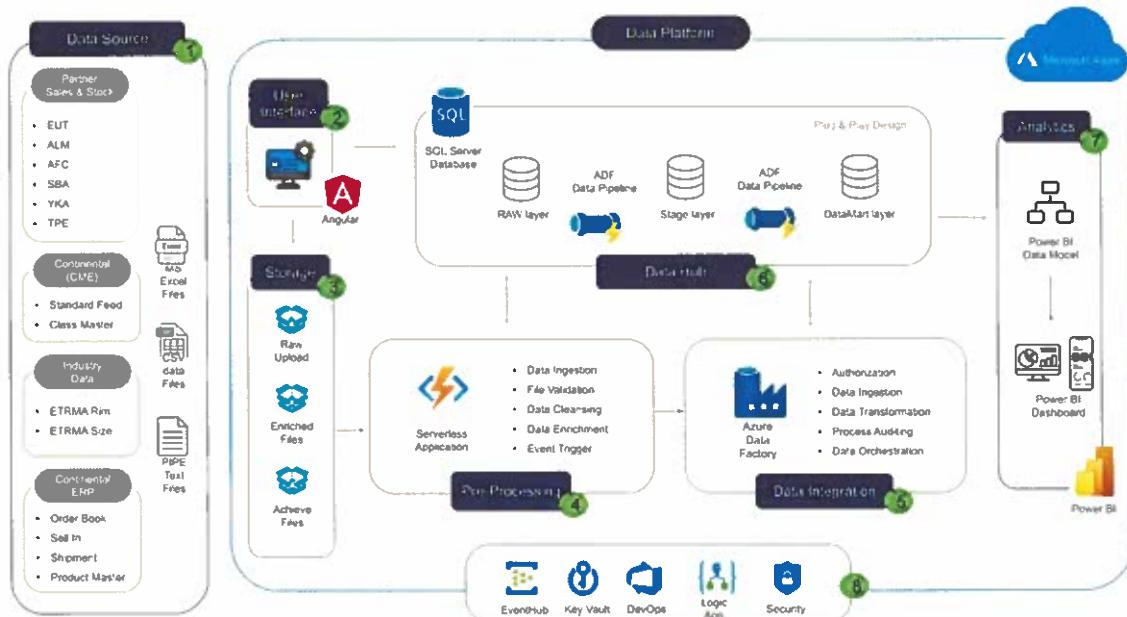


Diagram 3 : Technical Architecture of Data Infrastructure Modernization

## Business Outcomes

The implementation of the Azure Data & Analytics solution yielded significant business benefits:

- Improved Decision-Making: Real-time data processing and visualization enabled data-driven insights, supporting client's strategy to make timely, informed decisions across various business functions.
- Enhanced Scalability and Performance: The cloud-based infrastructure provided a scalable foundation capable of handling growing data volumes and diverse data types, ensuring future-ready analytics capabilities.
- Operational Efficiency: Automated workflows for data ingestion, processing, and notification reduced manual intervention, minimized errors, and streamlined data operations.
- Increased Security and Compliance: With Azure's advanced security features, sensitive data was well-protected, meeting their data governance standards and fostering stakeholder confidence.
- Higher Data Accessibility: A unified data mart and user-friendly dashboards provided quick access to comprehensive insights across sales, inventory, partner data, and industry trends, supporting an analytics-driven approach.

## Relevance

This project highlights our expertise in automating data acquisition, processing, and reporting, which directly aligns with the needs of efficient and accurate data workflows in cloud environments. Implemented on Azure, it demonstrates our capability in leveraging cloud technologies to enhance data automation and reduce manual effort. Additionally, A UI that was built allowing data upload, updates, and configuration will help us to build a manual data collection interface.

## Revolutionizing Police Case Documentation

### Project Overview

The client for this project was the police force of India's third largest metropolis. In the rapidly evolving landscape of law enforcement, Indian state and central agencies face unprecedented challenges in managing vast amounts of data, ensuring operational efficiency, and staying ahead of sophisticated threats. The project will solve on-field and off-field challenges faced by Investigating officers, Cybercrime investigators, data analysts and decision makers.

### Problem Statement

- Investigation Officers (IOs) in the Police Department face multiple documentation challenges that compromise efficiency and case accuracy.
- Manual data entry processes are labor-intensive and error-prone, making it difficult to keep case records updated and secure.
- With the recent introduction of the Bharatiya Nyaya Sanhita (BNS) and Bharatiya Nagarik Suraksha Sanhita (BNSS) legal codes, officers struggle to identify the relevant legal sections, impacting documentation accuracy.
- Limited technological proficiency among officers further complicates the handling of multimedia evidence, and missed deadlines affect the timely progression of cases.

These challenges underscored the need for a modernized, streamlined approach to case documentation.

### Solution Provided

To address these issues, an AI-powered web and mobile application was developed specifically for the city police. It optimizes case documentation by automating repetitive tasks, enhancing data security, and simplifying complex processes. The solution offers a range of features designed to support Investigation Officers (IOs) at each stage of case documentation:

- **AI-Based Writing Assistance:** We used intelligent form-filling with auto-suggestions, simplifying documentation by recommending applicable sections and subsections from the BNS and BNSS based on crime descriptions. This feature helps IOs navigate new legal codes accurately, while grammar and spell-check tools ensure high standards in report quality.
- **Smart Forms with Auto-Fill Capabilities:** Smart forms reduce repetitive data entry by automatically populating information across related documents, minimizing errors and ensuring consistent documentation throughout the investigation process.

- **Secure Digital Storage:** We securely stored all case files, including images, videos, and other media, providing a centralized repository for case materials. This digital storage ensures data is protected from loss or damage and allows for easy retrieval of critical case files.
- **Advanced Search with OCR and Translation:** To enhance accessibility, our solution includes an advanced search feature, allowing officers to locate files, notes, and media by keywords, tags, or case numbers. Integrated OCR (Optical Character Recognition) capabilities enable document scanning, while multilingual translation assists with cross-regional investigations, broadening the utility for officers handling diverse cases.
- **Automated Reminders and Event Management:** It sends timely notifications for important meetings, deadlines, and other case-related events, helping IOs stay on schedule and reducing the likelihood of missed appointments, which can impact case outcomes.

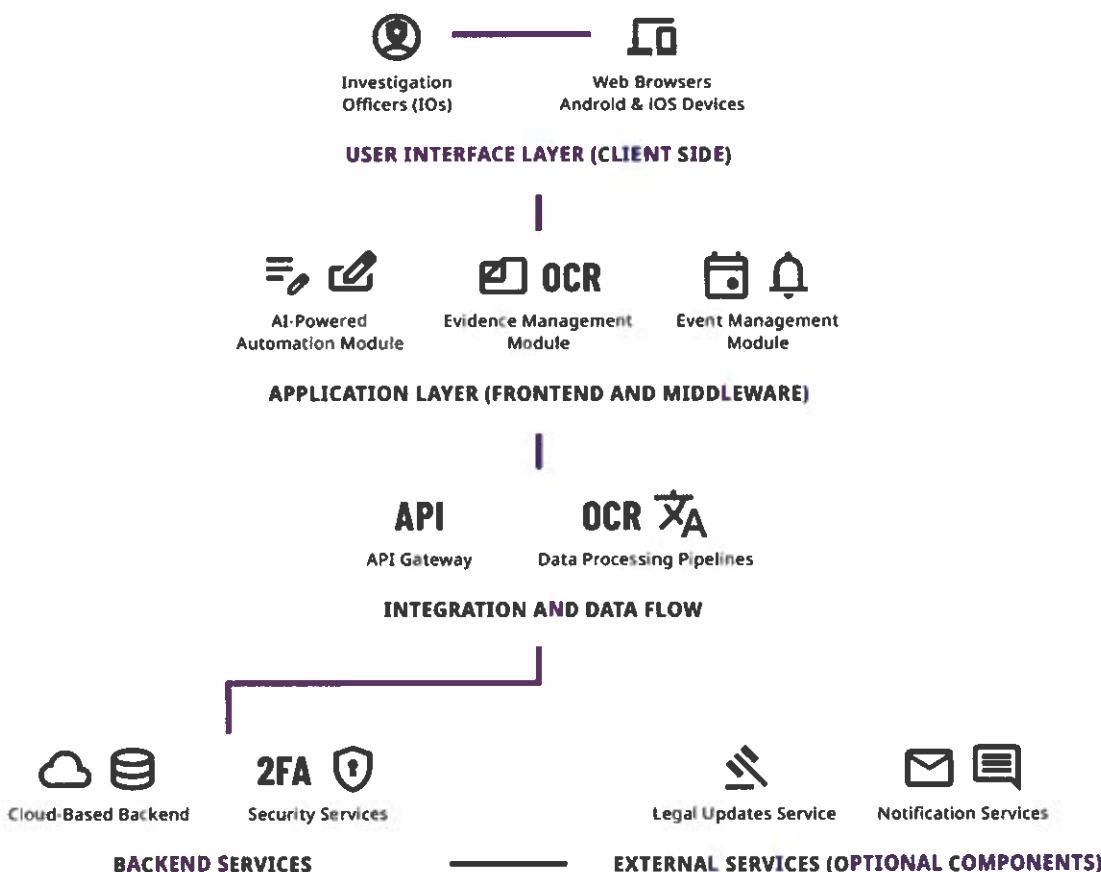


Diagram 4 : Technical Architecture of Police Case Documentation Revolution

## Business Outcomes

The deployment of this solution significantly improved case documentation processes for the Kolkata Police:

- **Enhanced Documentation Accuracy:** The AI-powered guidance and automated suggestions for legal codes (BNS and BNSS) minimized errors in case filings, ensuring that each case met the latest compliance standards.
- **Increased Efficiency:** Smart forms, auto-filling, and automated reminders reduced manual workload and streamlined case management, allowing officers to dedicate more time to core investigative activities rather than administrative tasks.
- **Improved Evidence Management:** Secure digital storage allows officers to manage multimedia evidence more effectively, protecting it from potential loss or damage, which is essential for maintaining the integrity of case evidence.
- **Greater Accessibility and Flexibility:** Advanced search functions, OCR capabilities, and multilingual support made it easier for officers to locate information, collaborate on cases, and manage cross-regional investigations.
- **Enhanced Accountability and Timeliness:** Automated reminders ensured that officers met deadlines and attended important events, reducing missed appointments and supporting timely case resolutions.

### Relevance

This project showcases our ability to address operational challenges within law enforcement agencies. By enhancing the capabilities of investigators, analysts, and decision-makers, we demonstrated how advanced data solutions can improve efficiency and response to emerging threats. Our experience in extracting insights from law enforcement will help Charleston Police Department on future post implementation of data platforms.

## Migrating Legacy Data Warehouse to Snowflake for Enhanced Performance and Scalability

### Project Overview

Our client, a pioneering online survey development leader in the US, offers cloud-based surveys and a diverse suite of survey products tailored to various industry segments.

- To keep pace with their growth and evolving technology landscape, the company embarked on a data infrastructure modernization journey.
- The primary goal was to migrate their legacy SQL Server data warehouse from a private data center to a cloud-based Snowflake data warehouse, aiming for improved performance, scalability, and cost efficiency.

### Problem Statement

The client faced several challenges with their legacy SQL Server data warehouse, including:

- High operational costs associated with maintaining a private data center.
- Limited scalability to support growing data volumes and increasing analytical demands.
- Suboptimal performance impacting batch processing and reporting efficiency.
- The need for a seamless migration with minimal disruption to ongoing operations.

## Solution Provided

To address these challenges, we implemented a comprehensive migration strategy. Our approach included:

- **Thorough Assessment:** Conducting a detailed analysis of the existing SQL Server data warehouse to identify potential challenges and opportunities for optimization.
- **Robust Migration Plan:** Designing a migration strategy that minimizes downtime and ensures data integrity. This involved:
  - Custom scripts and third-party tools for efficient data transfer.
  - Optimization of data structures and processes for improved performance.
- **Seamless Execution:** Implementing the migration with a focus on maintaining business continuity and minimizing disruption to ongoing operations.
- **Performance Enhancement:** Enhancing batch processing and reporting capabilities to ensure early data availability and improved business insights.
- **Ongoing Support:** Providing continuous support and monitoring to ensure the stability and efficiency of the new system.

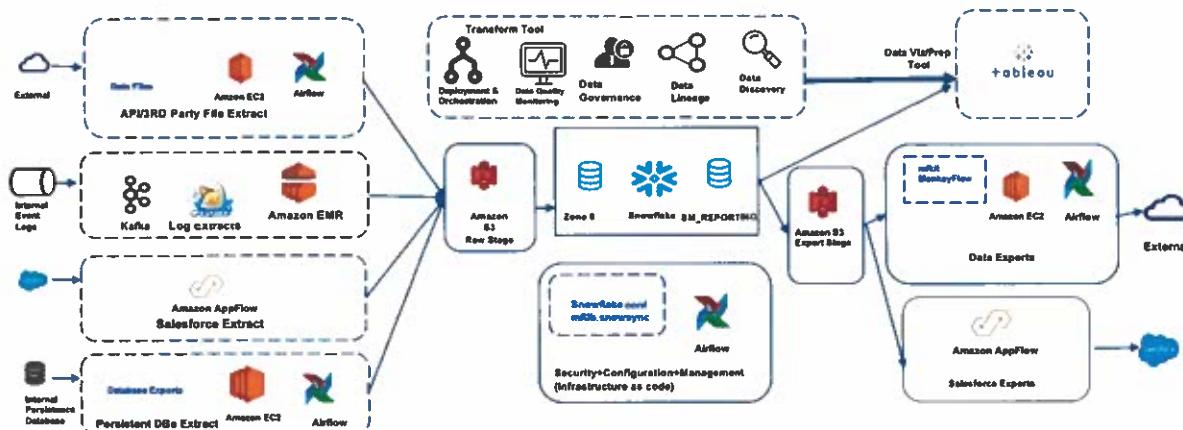


Diagram 5 : Technical Architecture of Migrating Legacy Data Warehouse to Snowflake

By migrating to Snowflake, our client successfully modernized their data infrastructure, achieving significant performance improvements, cost savings, and scalability.

### Business Outcomes

The migration to Snowflake delivered several significant benefits to the client:

- **Timely Data Availability:** The highly performant Snowflake platform improved batch execution and reporting performance, enabling early access to critical business data.
- **Cost Efficiency:** The transition resulted in substantial reductions in data center and ongoing operational costs, freeing up resources for other strategic initiatives.
- **Enhanced Scalability:** The flexible and scalable Snowflake platform supports the client's long-term goals, offering the capacity to handle future growth and increasing data demands.
- **Objective Achievement:** Detailed analysis and timely execution helped the client meet their critical objectives despite stringent deadlines.

The project not only addressed their immediate needs but also positioned them for future growth and success. This project exemplifies our commitment to delivering tailored, high-impact solutions that drive tangible business benefits.

### Relevance

The case study demonstrates successful migration of a legacy SQL Server data warehouse to a cloud platform, highlighting key strategies for performance, scalability, and cost efficiency applicable to cloud based projects. It also shows expertise in handling complex data environments.

## AI-Powered Federal Grant Processing Solution

### Project Overview

Our client, one of the 'Big Three' management consulting companies, wanted to build a GenAI based solution that will help finding the relevant grants from a portal and categorizing the grants, thereby offering a text matching solution that is an improvement on traditional keyword based solutions.

### Problem Statement

- The process of identifying, categorizing, and managing federal grants is a complex and time-consuming task that requires handling vast volumes of information from multiple sources.
- Grant review and application services for clients were hindered by the lack of a streamlined, centralized system for consolidating grant information.
- This inefficiency not only increased the time and resources needed for grant processing but also posed a risk of missing critical opportunities due to delayed reviews or misclassification of grants.

Client needed a solution to automate and simplify grant processing, enabling faster, more accurate reviews and improved assignment of grants to the appropriate stakeholders.

### Solution Provided

To address these challenges, Kellton developed an AI-powered grant processing solution specifically designed for federal grant management. This solution leverages advanced artificial intelligence to

automate grant aggregation, categorization, and tracking, providing BCG with an end-to-end tool to enhance efficiency and accuracy. Key features include:

- **Data Aggregation:** The solution aggregates grant information from various federal websites and sources into a unified database, providing a centralized repository for all grant-related data. This allows BCG to eliminate redundancy and ensure consistency in information across multiple grant sources.
- **Advanced AI Categorization:** Leveraging sophisticated AI models, the platform analyzes and categorizes grants into distinct classifications based on factors such as purpose, eligibility, funding size, and other critical attributes. This AI-driven categorization improves the speed and accuracy of grant review processes, reducing human error and ensuring that grants are classified effectively.
- **Stakeholder Assignment:** The platform intelligently assigns grants to relevant stakeholders within BCG's network according to predefined criteria, such as area of expertise, grant requirements, or specific client interests. This automated assignment process ensures that each grant reaches the most appropriate reviewers and reduces delays in the review cycle.
- **Grant Tracking and Monitoring:** The solution includes a comprehensive tracking and monitoring tool to follow the progress of each grant application. Users can track the status of applications, monitor key deadlines, and receive updates on grant awards, ensuring that all stakeholders remain informed throughout the application lifecycle.

## Business Outcomes

The implementation of this AI-powered federal grant processing solution delivered substantial benefits for our client and its partners:

- The platform's automated data aggregation and AI categorization streamlined the grant review process, reducing the time required to locate, categorize, and review grant opportunities.
- Advanced categorization using AI minimized the potential for human error, enhancing the accuracy of grant classifications and ensuring compliance with federal guidelines.
- By automating the assignment of grants to stakeholders, the solution ensured that each grant was directed to the right personnel, improving response times and allowing stakeholders to focus on grants aligned with their expertise.
- The tracking and monitoring tools provided BCG with a transparent view of each grant's progress, allowing for better management of application timelines and increasing the likelihood of successful grant submissions.
- The increased efficiency and accuracy in grant processing allowed BCG to provide clients with faster, more reliable services, enhancing client satisfaction and positioning BCG as a leader in federal grant application management.

## Relevance

This project underscores our expertise in developing advanced GenAI-based solutions to enhance data search and categorization. By leveraging AI for text matching, we moved beyond traditional keyword-based approaches, delivering more accurate and relevant results for grant discovery. Our experience will surely help in analyzing text data with cutting edge technologies.

## Streamlined Data Management for Real Estate

### Project Overview

A licensed real estate brokerage firm in the US having operations in 7 states and managing over 2,000 properties, needed to optimize its data management processes. The company's core operations include buying, selling, and managing properties, alongside services like acquiring, underwriting, renovating, and property management. The goal was to automate their diverse data sources—including website traffic, CRM, virtual experiences, marketing, and social media—into a unified data and analytics solution, reducing manual work and enhancing reporting accuracy.

### Problem Statement

- Fragmented data systems with multiple silos, including CRM, Salesforce, Google Sheets, and third-party property websites.
- Lack of a centralized data repository, leading to inconsistent, error-prone reports and limited historical insights.
- Difficulty in creating an integrated business view and analytics solution across various data sources.
- Transactional data maintained separately within Google Sheets, without a single source of truth for reporting.

### Solution Provided

- Centralized Data Warehouse: Implemented an AWS-based data warehouse to integrate and streamline data flows across diverse systems, optimizing costs.
- Unified Data Integration: Utilized ELT and ETL processes to consolidate data from various sources and orchestrate workflows through Airflow.
- Automated Data Pipelines: Developed automated workflows for intraday batch and historical data ingestion, utilizing Python, S3, and Airflow for seamless data processing.
- Data Transformation & Storage: Cleaned, transformed, and stored data efficiently within a scalable AWS PostgreSQL data warehouse.
- Advanced Analytics & Reporting: Integrated Metabase and Looker Studio for robust data visualization, empowering business users with actionable insights and improved KPIs.

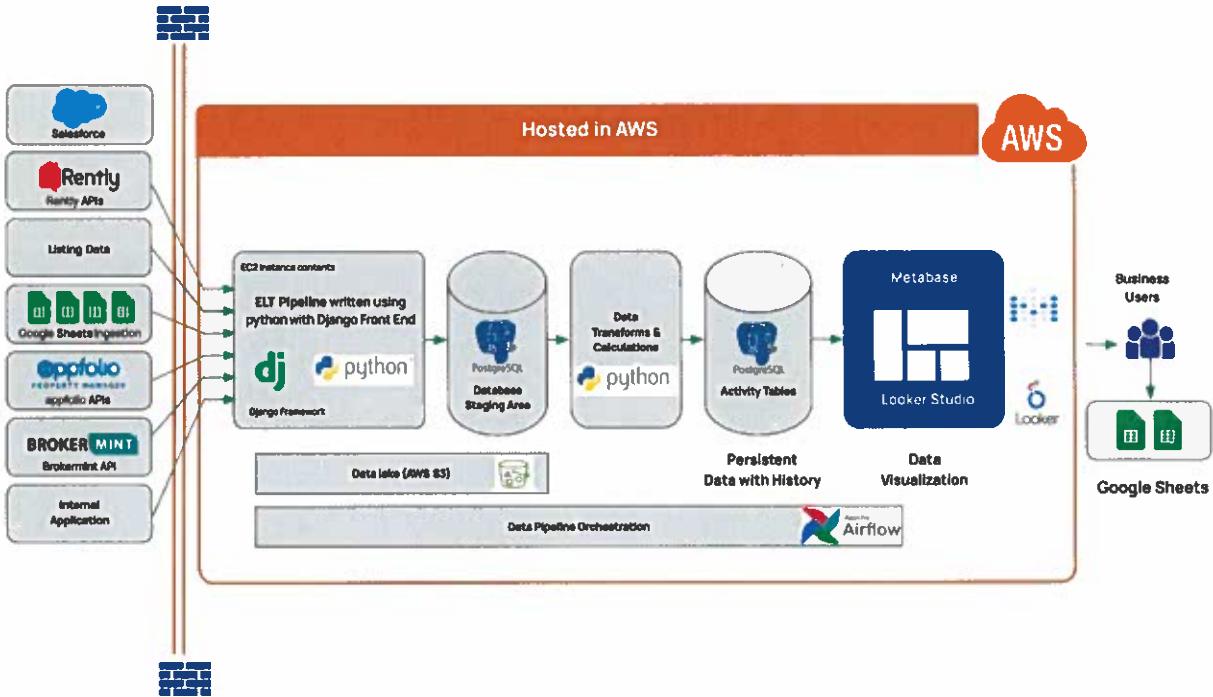


Diagram 6 : Technical Architecture of Streamlining Data Management for Real Estate

### Business Outcomes

- **Operational Efficiency:** Reduced manual data entry and errors, automating key processes for better productivity.
- **Data Consistency:** Achieved a single source of truth, ensuring accurate and reliable reporting across the organization.
- **Enhanced Reporting:** Provided advanced reporting templates and KPIs, enabling strategic decision-making with richer insights.
- **Cost Optimization:** Delivered a cost-effective, scalable data architecture on AWS to support long-term business needs.
- **Improved Decision-Making:** Enabled data-driven decisions with access to integrated, real-time analytics and historical data insights.

### Relevance

This project highlights our expertise in integrating and optimizing diverse data sources into a unified analytics solution, which is crucial for organizations managing complex operations. By automating data processes across various platforms like CRM, marketing, and website traffic, we improved reporting accuracy and reduced manual effort. Our experience in delivering streamlined data solutions for real estate operations is directly applicable to future projects requiring efficient data integration and enhanced analytics for data driven decision-making.

## Business Need

### Need Statement

The City of Charleston Police Department (hereafter referred to as CPD) requires a modern, integrated data analytics ecosystem to transform its current siloed data landscape into an automated, insight-driven operation.

Procedural changes to connect disparate datasets have been implemented, but CPD continues to face operational friction due to manual data preparation, inconsistent analysis processes, and limited stakeholder access to critical information.

The goal is to shift from labor-intensive data compilation to high-value analytical activities that drive strategic law enforcement decisions.

The solution needs to integrate multiple data sources, automate data cleaning and preparation workflows, and deliver real-time insights through secure, role-based access channels. It will serve both internal operations and public transparency requirements while maintaining CJIS compliance & robust security protocols.

CPD therefore seeks to eliminate data silos, reduce analytical latency, ensure consistency in reporting, and empower both departmental & public stakeholders with timely access to critical law enforcement insights.

With the support of a grant from the U.S. Department of Justice, CPD's goal is to enhance decision-making, optimize police operations, and support the department's problem-oriented policing initiatives through advanced, real-time data analysis and visualization.

### Statement of Work

The scope broadly includes the following components:

- **Data Collection:** Incorporate tools for efficient data collection, including web forms for structured data entry into an analytics-ready database. This ensures that data is readily available for analysis.
- **Data Integration:** Integration across multiple data sources, including databases, cloud services, and third-party applications. Support primarily for batch processing with a capability to ingest flat files (to facilitate the integration of legacy data).
- **Data Storage and Management:** Scalable data storage solutions are needed to accommodate CPD's growing data needs. Ensure efficient data retrieval and management with capabilities for data replication to support analysis and reporting. Full administrative access is required for CPD administrators, and hosting options to include CJIS-compliant on-prem or cloud-based solutions.
- **Data Processing and Analysis:** Advanced analytical tools, including statistical and geospatial analysis, as well as machine learning capabilities. Support for custom analytics models and scripts (e.g., Python, R) will allow for flexible and tailored analytics. Data quality assistance and data harmonization between legacy and modern systems will ensure analytical accuracy.

- **Data Visualization:** Web-based platform with customizable, interactive dashboards with a range of visualization options, including charts, graphs, maps, and advanced geo-spatial representations. Compatibility with ArcGIS layers is essential to enhance spatial analysis and reporting capabilities.
- **Reporting:** Automated report generation support and scheduling capabilities to ensure timely delivery of insights to CPD's stakeholders. Customizable templates to meet various reporting needs and ability to publish reports to a secure, access-controlled web portal. Automated emailing of reports for efficient communication.
- **User Access and Security:** Role-based access control required to secure sensitive data, supporting both Active Directory and non-Active Directory accounts. Ensure compliance with data encryption and regulatory requirements to maintain high data protection standards.
- **Training and Support:** Comprehensive training for end-users and administrators is necessary to ensure smooth adoption of the platform. Ongoing technical support and maintenance will keep the platform running optimally and allow for future enhancements.

By fulfilling these requirements, the solution needs to address CPD's current challenges, enabling more accurate, real-time analysis and visualization of data, thereby enabling data driven decision making and improving CPD's policing strategies.

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## Our Understanding

In the following few sections/subsections, we cover our understanding of the requirements laid out in the RFP. We break the requirement down in different dimensions to gain a 360° view of the problem statement. The more deeply we understand the business need, the better poised we are to solve it.

First, we establish a baseline understanding of CPD's needs, followed by challenges and CPD's current landscape, following which we articulate the project's boundaries (in scope/out of scope). Finally, we identify guiding principles that inform our solutioning thought process.

### Summary

The City of Charleston Police Department (CPD) seeks a comprehensive data analytics solution with centralized, integrated, and secure capabilities to support data-driven decision-making. Based on the RFP and the Q&A responses, our understanding of CPD's key requirements is as follows:

- **Centralized Data Storage and Access:** CPD requires a unified data warehouse to consolidate information from critical sources such as the Records Management System (RMS), Computer-Aided Dispatch (CAD), and external databases. A centralized data source will streamline cross-referencing & analysis, providing CPD with a comprehensive view of its operations.
- **Timely Reporting and Analytics:** The solution should enable efficient and timely reporting on metrics like crime trends, response times, and resource distribution. It will support scheduled batch processing for regular reporting and advanced analytics, allowing CPD to analyze trends, perform geospatial analysis, and produce actionable insights.
- **Integrated Geospatial Visualization:** A robust geospatial component is necessary to support CPD's need for map-based visualizations, including crime hotspots, patrol areas, and incident distributions. This will enhance CPD's situational awareness & inform strategic resource allocation.
- **Security and Compliance:** The solution must comply with CJIS (Criminal Justice Information Services) standards, with strict data security measures such as role-based access control, data encryption, and audit logging to ensure only authorized personnel access sensitive information.
- **Scalability and Flexibility:** CPD's solution should be able to scale with growing data volumes, new data sources, and future analytics needs, such as integration with machine learning or predictive analytics. The system's flexibility is key to adapt to evolving requirements.

### Challenges and Needs To be Addressed by the Solution

The proposed solution will address the following specific challenges CPD currently faces:

- **Fragmented Data Systems:** CPD's data is spread across multiple systems that are not fully integrated, which limits its ability to conduct cross-functional analysis. Unifying this data will enable more effective reporting and insights that correlate incidents with resources, geographic data, and response outcomes.

- **Reporting Limitations:** CPD's current reporting processes are manual and time-intensive, which can delay critical decision-making. This solution will need to streamline reporting workflows, making insights available in a timely manner to support proactive and responsive policing.
- **Geospatial Data Gaps:** CPD has limited access to integrated geospatial analysis, which affects its ability to conduct location-based assessments and map out crime patterns. The solution's geospatial visualization capabilities will need to support layered and interactive mapping for improved analysis.
- **Data Security and Compliance Needs:** Current data management processes may not meet all CJIS standards, particularly around access control, encryption, and audit requirements. The proposed solution will need to establish these protections, reducing compliance risks and safeguarding sensitive data.
- **Scaling Constraints:** Existing systems may not efficiently support the growth in data volume or advanced analytics, limiting CPD's ability to implement more sophisticated analytical techniques and gain accurate insights in the needed timeframes. The solution will need to be built on a scalable architecture in order to allow CPD to expand its data analytics capabilities without requiring a major system overhaul.

The objective is to directly address CPD's operational challenges via a secure, scalable, integrated data platform that aligns with CPD's long-term goals for data-informed policing & improved public safety.

## Current Landscape

### Data Collection and Integration

- Sources: Six enterprise SQL databases, access databases, flat files, third-party systems.
- Integration: SQL scheduled processes, ArcGIS Data Modeling, Access-based procedures.
- Frequency: Mostly batch processing; limited real-time capabilities.
- Challenge: Non-standardized formats, manual integration processes.

### Data Storage and Management

- Infrastructure: On-premises SQL Server instance; existing data warehouse in need of restructuring.
- Requirements: Scalability, redundancy, 24-hour downtime limit, CJIS compliance.
- Solution Flexibility: On-premises or CJIS-certified cloud options acceptable.

### Data Processing and Analysis

- Tools: SQL Server, MS Access, Excel, ArcGIS for spatial analysis, PowerBI for basic visualization.
- Current Analytics: Geospatial and temporal analysis; no machine learning capabilities.
- Challenge: Manual data preparation, complex SQL Views, high dependency on SQL expertise.

### Data Visualization and Reporting

- Platforms: PowerBI, ArcGIS Online for dashboards and reports.
- Access: ~100 current internal users, aiming to expand to 400-500.
- External Sharing: Manual web uploads; limited automated web-based access.

### User Access and Security

- Access Control: Active Directory role-based access, 4-5 security levels.
- Compliance: CJIS requirements for data encryption, retention, and periodic purging.

### Training and Support

- Staff: Limited data analyst capacity, varying expertise levels.
- Needs: Training for administrators, end-users, and power users for self-service reporting.

## In-Scope

### Data Collection

- Web Forms: Develop web forms for 50 data points.
- Multi-Source Data Handling: Combine data from multiple sources, including manual entries, SQL tables, and existing systems, to manage it centrally.
- Data Validation: Apply validation rules at entry to ensure accuracy and completeness.

### Data Integration

- Multiple Data Sources: Integrate data from 6 sources, including direct SQL, cloud APIs, and SFTP flat files, providing CPD with a comprehensive, cross-platform view.
- Batch Process Ingestion: Support batch ingestion for timely updates.
- Flat File Compatibility: Enable ingestion and processing of flat files (e.g., CSV, Excel) and other non-database formats to support existing systems.

### Data Storage and Management

- Scalable Storage Architecture: Storage solutions that scale horizontally to handle increasing data volumes while maintaining performance.
- Optimized Data Retrieval: Indexing & partitioning to improve data retrieval, query performance.
- Data Replication: Enable replication for analysis & reporting, ensure availability of critical datasets.
- Administrative Access: Allow designated CPD personnel full administrative access to manage data access, integrity, and compliance.

### Data Processing and Analysis

- Analytical Tools: Include tools for data analysis and geospatial analysis.
- Data Quality Management: Establish methods to cleanse/transform data to prepare it for analysis.
- Legacy System Integration: Facilitate methods to link legacy systems with the new analytics platform for data migration and alignment.

### Data Visualization

- Report Count: The solution will deliver a total of 30 reports.
- Web-Based Dashboard Access: Dashboards will be accessible through a web-based interface, removing the need for client-side software installations.
- Interactive Dashboards: Users will have access to interactive dashboards with drill-down features and options for selecting specific metrics, enabling deeper data exploration.
- Flexible Visualization Options: The system will support multiple visualization formats, including charts, graphs, and maps, to present data clearly and accessibly.

- **Geospatial Analysis:** Geospatial capabilities will be integrated, allowing data overlay on maps and supporting ArcGIS layer integration for location-based insights.

### **Reporting**

- **Controlled Access Publishing:** Publish reports to a secure web portal with role-based access.
- **Automated Email Distribution:** Automate report distribution by email to ensure consistent delivery to recipients.

### **User Access and Security**

- **Role-Based Access Control (RBAC):** Assign data and functionality access levels based on user roles.
- **Active Directory Integration:** Integrate with Active Directory for authentication, while also accommodating non-Active Directory accounts as needed.
- **Data Protection Compliance:** Meet relevant data protection standards (e.g., CJIS) with encryption for data at rest and in transit.

### **Training and Support**

- **Training:** Provide training for end-users and administrators on system usage, data management, and analysis methods.
- **Technical Support:** Supply ongoing support for troubleshooting, upgrades, and user assistance to maintain the system.
- **User Documentation:** Create user manuals, quick guides, and online resources to support users in system navigation and use.

### **Out of Scope**

- **Limited Integration:** Integration is restricted to specified data sources and systems; additional third-party applications or new integrations are excluded unless explicitly defined in additional requirements.
- **Source Data Modification:** The project does not include modifications to source data; data will be processed in its original form as received.
- **Infrastructure and Licensing Costs:** Infrastructure setup, cloud hosting, cloud services, and software licensing costs are captured in this proposal. We assume CPD will procure the services without our intervention. However, if CPD would like for us to work with them to procure these services, we are open to do so as well and bill CPD appropriately.
- **AI/ML and Predictive Analytics:** Implementing AI, machine learning, or predictive analytics use cases is outside the current project scope.

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## Guiding Principles

Our key evaluation criteria & considerations for proposing a solution approach are articulated below:

- **Integration across CPD Systems**

Facilitate reliable integration with CPD's existing operational and geospatial data sources, ensuring a cohesive data environment that delivers comprehensive and accurate insights.

- **CJIS Compliance and Robust Data Security**

Strict adherence to CJIS standards and advanced data security measures are essential to safeguard sensitive law enforcement information, with access controls that protect data integrity and user privacy.

- **High-Quality Data Management**

Consistent data quality is paramount; efficient ETL (Extract, Transform, Load) processes should standardize and clean data to enhance the accuracy and reliability of analytics outputs.

- **Optimized Data Storage Architecture**

A scalable data lake for raw data storage alongside a structured reporting database will provide quick, efficient data access as data volumes increase, supporting both immediate needs and future growth.

- **Intuitive and Accessible Reporting Dashboards**

User-friendly, Power BI-driven dashboards should be designed for ease of interpretation, enabling officers and analysts to rapidly extract actionable insights from complex datasets.

- **Comprehensive Data Governance and Staff Training**

Effective data governance policies and thorough training programs will empower CPD personnel to manage data responsibly, maintain compliance, and ensure efficient system use.

- **Focused Project Management**

Clear project milestones, defined roles, and regular progress reviews will drive the project forward, enabling timely identification & resolution of potential issues.

- **Sustained Support and System Optimization**

Post-deployment support and regular updates are essential to ensure the platform's ongoing effectiveness, adapting to evolving CPD requirements and technological advancements.

In the next section, we look at the proposed solution approach.

## Solution Approach

Now that we've built a clear understanding of the business requirement & context itself, let us move to how we believe this should be approached & solved. In the following sections, we outline our approach to solutioning this requirement.

We start with a schematic view & logical blocks that identify the solution's core components & layers (the "how"), followed by the technology choices & architectures that form the solution itself (the "what"); followed by, crucially, the critical success factors that inform our decision-making & recommendation (the "why").

This solution framework in this section addresses the City of Charleston Police Department's (CPD) needs for data integration, processing, storage, analytics, and security. The architecture consists of five core layers, each performing a defined role to optimize data flow, accessibility, and operational insights.

### Schematic View



Diagram 7: Schematic view

### Solution Architecture: Logical View

The diagram above captures the schematic view of the solution. It outlines the three core blocks: Source, Storage and Analytics; each of which are broken down further in the solution approach & architecture below.

#### Data Collection

Data collection will gather information from multiple sources, including CPD systems and manual entries, to ensure complete and accurate data for analysis.

#### 1. Multi-Source Data Ingestion

- **Source Systems:** Data will be collected from 6 systems like RMS, CAD, SQL databases, and select third-party applications.
- **Batch Processing:** Data will be ingested in scheduled batches for efficient, large-scale updates.
- **Flat File Ingestion:** Automated flat file ingestion (e.g., CSV, Excel) will support compatibility with various external data formats.

#### 2. Web-Based Data Entry Forms

- **Forms:** Web forms for 50 data points will capture manual data inputs from CPD personnel, configurable to different data needs.

- **Data Validation:** Each form will include validation rules to ensure accuracy and completeness at entry, maintaining high data quality.

### Data Storage (Staging)

- **Centralized Staging Area:** Data from diverse sources is ingested into a centralized staging environment that serves as the repository for raw data. This staging area supports multiple data formats, facilitating unified processing and storage.
- **Unified Data Ingestion:** Data is ingested in batch processes, consolidating information from various sources within a cohesive framework for consistent handling.
- **Historical Data Retention:** The staging area retains complete historical records, preserving access to legacy data for longitudinal analysis and trend assessment.

### Data Processing and Transformation

- **Data Quality Management:** Data undergoes validation to remove duplicates, normalize fields, and standardize formats, ensuring consistent and reliable data for downstream analysis.
- **Transformation and Structuring:** Business rules and logic are applied to raw data, organizing it into structured, analysis-ready formats. This includes aggregating incident data, categorizing crime types, and enriching datasets with demographic and geographic attributes.
- **Incremental Data Updates:** The solution supports incremental updates, processing only new or modified records to improve efficiency and optimize resource use.

### Structured Data Storage

- **Data Warehouse Schema:** Processed data is stored in a structured data warehouse, organized in a schema using fact tables (e.g., incidents, responses, patrol logs) and dimension tables (e.g., time, location, personnel, crime type). This schema supports efficient querying, filtering, and analysis.
- **Partitioning and Indexing:** Key tables are partitioned and indexed by frequently queried fields (e.g., date, location, incident type) to meet performance benchmarks and enable fast data retrieval.
- **Pre-Aggregated Views:** Data frequently accessed for reports, such as daily incident summaries or response time metrics, is pre-aggregated or saved as materialized views to minimize query load on the data warehouse and improve report generation speed.

### Analytics and Visualization

- **Dashboards and Data Exploration:** This layer supports data access for reporting, dashboards, and interactive analytics. Dashboards provide visibility into core metrics such as crime trends, response times, and resource utilization, with options for filtering and drill-down.
- **ArcGIS Integration:** Integrated ArcGIS capabilities allow CPD to incorporate geospatial data directly into the analytics layer. CPD will use ArcGIS to:
  - **Display Spatial Data:** Visualize incidents, patrol areas, and other spatial metrics in map-based views.
  - **Customize Geospatial Analysis:** Tailor map views and layers to address specific analytical needs or operational priorities.
  - **Enable Team Collaboration:** Share consistent, map-based data visualizations to support coordinated planning and decision-making across the department.

## Reporting Strategy: Public and Internal Reporting

- **Public-Facing Reports:** For reports intended for the public, Power BI's "Publish to Web" feature will be used to present aggregated and anonymized data that safeguards sensitive information. Multilingual support (e.g., Spanish) will be provided for public reports as needed.
- **Internal Reports for Secure Access:** Internal reports are designed collaboratively with stakeholders and will offer enhanced data interactivity, live data updates, and in-depth visualizations. These reports will be available in a secure portal, controlled via Azure AD, with access restricted by RBAC to authorized personnel only.

## Security, Compliance, and Data Management

Security and compliance measures are embedded across each layer to protect data integrity, ensure privacy, and maintain system reliability.

- **Role-Based Access Control (RBAC):** User access is regulated based on roles, ensuring that personnel have access only to data and reports relevant to their responsibilities.
- **Data Encryption and Audit Logging:** Data is encrypted at both rest and transit points. Audit logs are maintained to track system access and changes, supporting compliance with CJIS and other relevant standards.
- **Monitoring and Alerts:** System performance, data access, and security events are actively monitored, with alerts in place for potential issues, ensuring timely intervention and continuous data management.

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## Technical Architecture

We've evaluated two approaches to meet CPD's needs:

- A cloud-based solution, or
- An on-premises solution.

Each approach includes mechanisms to meet CPD's security and compliance requirements, while offering different infrastructure and management options.

Given CPD's existing use of Microsoft products, moderate data volume (36 GB historical, 3 GB annual growth: Please refer to the table no. 1 below), and compliance needs, our proposed solution leverages Azure SQL Database (or on-prem SQL Server), Azure Data Factory (ADF) and Power BI; to create an adaptable, robust and cost-effective data platform.

This approach capitalizes on CPD's familiarity with the Microsoft ecosystem - an added advantage vis-a-vis efficient transition with minimal disruption.

System	Total Records	Total Storage (GB)	Annual Record Increase	Annual Storage Increase (GB)	Data Format
1	6,741,391	5.56	861,810	0.53	SQL Views
2	97,539,804	28.53	6,502,654	1.9	Direct SQL Connection
3	15,072,836	0.67	1,674,760	0.07	Cloud API
4	3,878,264	1.16	646,377	0.19	Flat File via SFTP
5	1,303,329	0.51	81,458	0.03	Direct SQL Connection

Table 1 : CPD's Data Volume & Growth

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## Proposed Solution 1: Cloud-Based (Recommended)

In the cloud-based approach, CPD's data and analytics systems are hosted on Azure, leveraging Azure Data Lake Storage (ADLS) for staging, Azure Data Factory (ADF) for integration and transformation, Azure SQL Database for structured data storage, and Power BI for analytics.

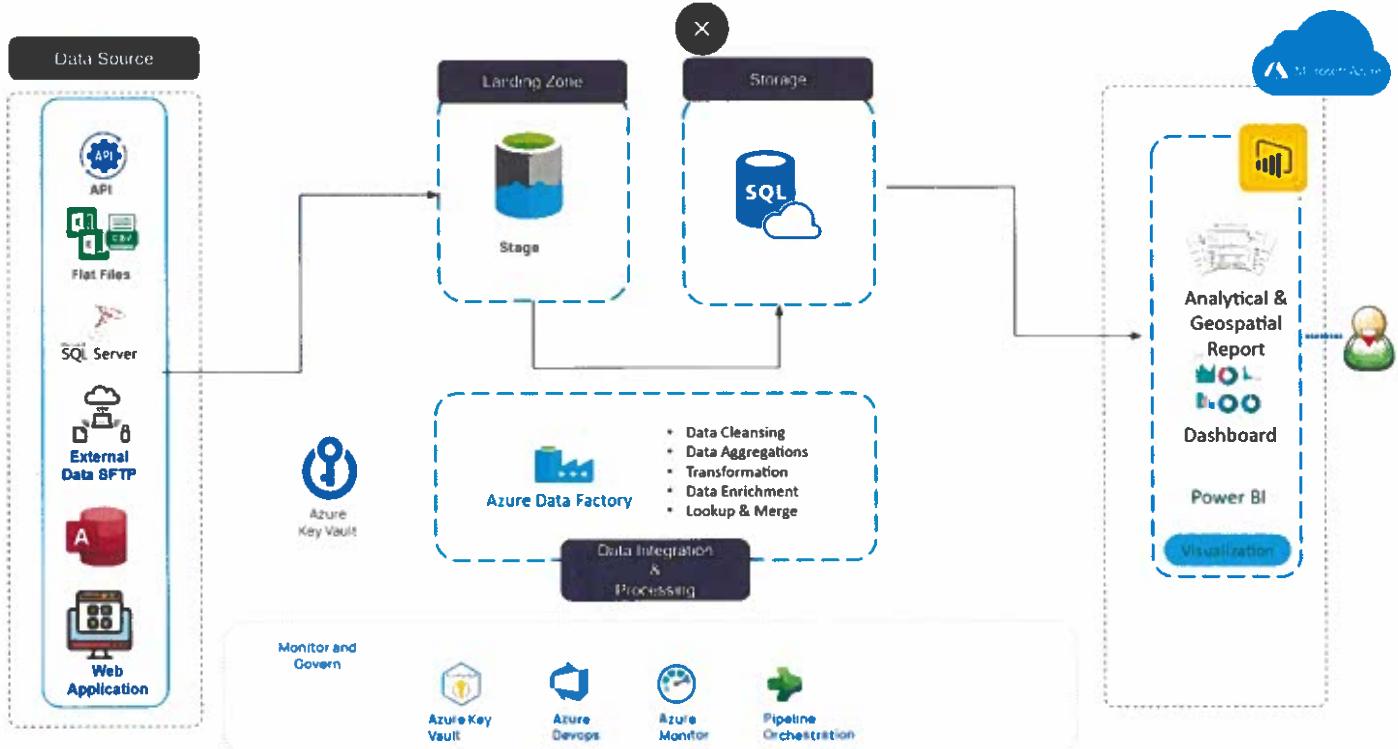


Diagram 8 : Proposed Cloud Based Architecture

- **Data Collection and Input Layer**

This layer will manage the intake of data from various sources, including automated data feeds and manual data entry through web forms.

- **Web Form Development:** Custom web forms will be developed to capture manual data inputs from CPD personnel. These forms will include configurable fields to meet diverse data entry requirements and embedded validation rules to ensure accuracy at the point of entry.

- **Data Staging in ADLS:** All source data is ingested into ADLS, a central data repository that can handle raw data in various formats. ADLS supports scalable storage and versioning, accommodating structured and unstructured data.

- **Data Integration with ADF:** ADF manages data cleansing, transformation, and standardization, moving data from ADLS to Azure SQL Database with incremental loading. ADF's connectors provide seamless integration with CPD's systems.

- **Data Warehouse in Azure SQL:** The data warehouse in Azure SQL Database is structured with fact and dimension tables to optimize querying and analytics. Partitioning and indexing ensure efficient data retrieval.
- **Analytics in Power BI:** Power BI dashboards connect directly to Azure SQL Database, providing insights, interactive dashboards, and geospatial mapping. Scheduled refreshes ensure up-to-date information for CPD's decision-making.
- **Security and Compliance in Azure:**
  - **Role-Based Access Control (RBAC):** Using Azure Active Directory (AAD), CPD can enforce role-based access to ADLS, ADF, and Azure SQL Database, ensuring that only authorized users can access sensitive data.
  - **Data Encryption:** Azure encrypts data at rest and in transit, meeting CJIS and other security standards for data privacy.
  - **Audit Logging and Monitoring:** Azure Monitor and Audit Logs track access, modifications, and other activities across Azure services, enabling full traceability and support for compliance reviews.

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## Proposed Solution 2: On-Premises

In the on-premises approach, CPD's data systems are hosted within the department's own infrastructure, using a shared folder for staging, SQL Server Integration Services (SSIS) for integration, SQL Server as the data warehouse, and Power BI for analytics.

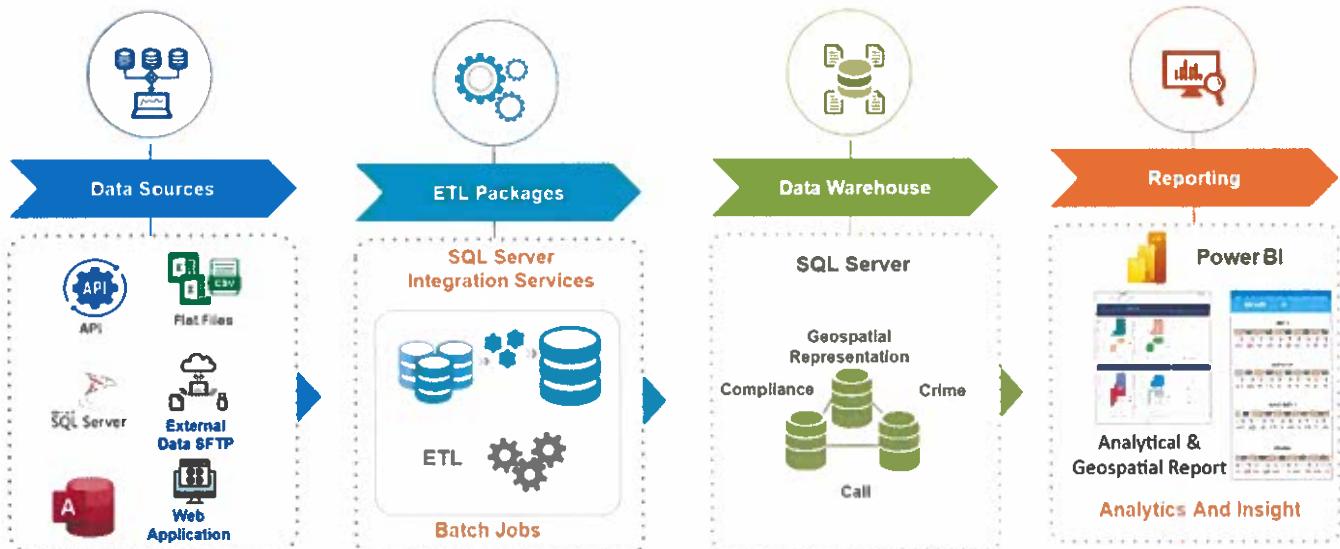


Diagram 9 : Proposed On-Premise Architecture

- **Data Collection and Input Layer**

This layer will manage the intake of data from various sources, including automated data feeds and manual data entry through web forms.

- **Web Form Development:** Custom web forms will be developed to capture manual data inputs from CPD personnel. These forms will include configurable fields to meet diverse data entry requirements and embedded validation rules to ensure accuracy at the point of entry.

- **Data Staging in Shared Folder:** A shared folder on CPD's network serves as the staging area, storing raw data in multiple formats. Connectors extract data from RMS, CAD, and other sources, centralizing it for further processing.

- **Data Integration with SSIS:** SSIS manages ETL processes, cleansing and standardizing data before loading it into SQL Server. SSIS workflows handle incremental data loads, ensuring efficient resource use.

- **Data Warehouse in SQL Server:** The SQL Server data warehouse is structured in a star or snowflake schema, organizing data for efficient querying and reporting. Indexing and partitioning support high-performance reporting.

- **Analytics in Power BI:** Power BI connects to SQL Server through an on-premises data gateway, providing dashboards, interactive data visualization, and geospatial mapping.

- **Security and Compliance On-Premises:**

- **Role-Based Access Control (RBAC):** CPD's SQL Server and shared folders can be configured with role-based access control, ensuring only authorized personnel can access data. This helps CPD control permissions internally.
- **Data Encryption and Audit Logging:** SQL Server supports encryption of data at rest and in transit, and logging can be enabled to monitor access and modifications, maintaining records for compliance with CJIS.
- **Network and Physical Security:** CPD's IT team would handle network security, such as firewalls and intrusion detection, as well as physical security for on-premises infrastructure to protect data from unauthorized access.

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## Comparison of Cloud-Based and On-Premises Solutions

Feature	Cloud-Based Solution	On-Premises Solution
<b>Scalability</b>	Scales on-demand with Azure's flexible storage and compute	Limited by physical infrastructure; requires hardware upgrades
<b>Cost</b>	Pay-as-you-go model with reduced upfront costs	Higher upfront costs for hardware, with fixed long-term costs
<b>Management</b>	Managed by Azure, reducing the need for internal maintenance	Requires ongoing maintenance and upgrades by CPD's IT team
<b>Data Control</b>	Hosted in Azure; some loss of physical data control	Full control over data within CPD's premises
<b>Security &amp; Compliance</b>	Built-in Azure security with RBAC, encryption, and audit logging managed by Azure	Internal management of RBAC, encryption, logging, and physical network security
<b>Analytics</b>	Power BI with direct integration for scalable analytics	Power BI with on-premises gateway for SQL Server access

Table 2 : Comparison between the proposed solutions

### Critical Success Factors

The following key considerations were taken into account during the decision-making process as to which approach would be ideal for CPD's needs.

#### 1. Adaptability and Ease of Adoption

Adoption is an important tenet of the CPD's existing familiarity with Microsoft products makes the cloud-based solution a natural fit, minimizing the learning curve:

- **Consistent User Experience:** Using Azure SQL Database & Power BI, CPD staff can leverage their current knowledge of Microsoft interfaces, reducing training needs, ensuring a smooth transition.
- **Unified Ecosystem:** The entire solution integrates naturally within the Microsoft stack, allowing CPD to maintain continuity in workflows & processes. This familiarity speeds up adoption across CPD departments & enhances operational efficiency.

#### 2. Right-Sized Data Integration and Storage

The solution's data architecture is designed specifically for CPD's **moderate data volumes**, ensuring efficient data handling without over-investing.

- **Optimized Database Setup:** Azure SQL Database for structured data, CPD can transition data seamlessly into a single environment that scales only as data needs grow. This setup provides efficient storage and retrieval without the over-capacity associated with large data platforms.
- **Automated ETL for Daily and Weekly Updates:** Azure Data Factory (ADF) and SSIS provide automated, scheduled ETL processes to manage data integration from RMS, CAD, and other sources. This approach reduces manual intervention and ensures that data flows smoothly from staging to analysis on a daily or weekly basis, aligning with CPD's reporting schedules.

### 3. CJIS-Compliant Security and Governance

Our solution prioritizes security and compliance, ensuring CPD's data management aligns with strict law enforcement standards:

- **Built-In CJIS Compliance:** Azure SQL Database and on-prem SQL Server include essential CJIS-compliant security features like role-based access, encryption, and audit logging. This secure infrastructure allows CPD to meet regulatory standards seamlessly.
- **Data Governance and Control:** SQL Server's governance tools provide control over auditing and access management, enhancing data security and making compliance easier to maintain across CPD's teams.

### 4. Comprehensive, Analytics with Power BI

Our solution provides CPD with robust analytics capabilities, using Power BI's advanced features to deliver insights that meet operational needs:

- **Dashboards:** Power BI enables CPD to create dashboards with filtering and drill-down capabilities, offering actionable insights for officers, analysts, and administrators. Automated daily and weekly reports reduce reporting time and improve decision-making speed.
- **Geospatial Analysis:** Power BI's integration with ArcGIS allows CPD to analyze location data with ease. This feature aligns with CPD's need for spatial insights.
- **Public-Facing Reports:** Power BI's web-publishing feature allows CPD to securely share select data with the external users, if required.

### 5. Cost-Effectiveness and Low Maintenance

By using Azure SQL Database and Power BI, the solution remains cost-efficient and manageable:

- **Scalable with Controlled Costs:** Azure's pay-as-you-go model keeps costs aligned with usage, allowing CPD to scale storage and processing incrementally as data grows. This cost model avoids the excess costs associated with large data warehouses, ensuring CPD pays only for the resources it needs.
- **Simple Maintenance with Microsoft's Support:** Familiarity with SQL Server and Power BI reduces the operational burden on CPD's IT staff. Microsoft's ongoing support for Azure SQL, Power BI, and ADF keeps the solution up-to-date, secure, and optimized with minimal internal overhead.

### Pros and Cons

- **Cloud-Based Solution:**
  - **Pros:** Scalable, lower upfront costs, managed infrastructure, built-in security with Azure.
  - **Cons:** Recurring subscription cost, dependency on cloud services and internet access, less direct control over physical data storage.
- **On-Premises Solution:**
  - **Pros:** Full control over data and infrastructure, fixed costs after initial setup, data remains entirely on CPD premises.
  - **Cons:** Higher upfront costs, limited scalability, increased responsibility for maintenance and compliance management.

## Our Recommendation

The cloud-based approach offers scalability and reduced infrastructure management, while the on-premises approach provides greater control over data and infrastructure.

We recommend the cloud-based approach for reasons articulated in the previous section(s).

However, CPD's choice would ultimately depend on its priorities around control, budget & future scalability.

To support CPD's evolving data landscape, we recommend implementing a data lake as a foundational step. **Azure Data Lake Storage (ADLS) Gen2** provides flexible, scalable storage for structured and unstructured data, positioning CPD to harness advanced analytics and streamline reporting. Here's how a data lake can continue to serve CPD's data related needs in future:

- **Ability to Integrate New Data Sources**

A data lake can easily accommodate new data types, such as IoT sensor data, social media feeds, and high-resolution images. This allows CPD to expand data ingestion without requiring structural changes to the existing database or warehouse.

- **Support for Advanced Analytics and Machine Learning**

By storing raw, granular data, a data lake enables advanced analytics and machine learning. Future predictive models and AI-driven insights can be trained on historical data stored in the lake, providing powerful crime forecasting and resource optimization capabilities.

- **Cost-Effective Storage for Large Data Volumes**

Data lakes are typically more cost-effective for storing large datasets. CPD can store high volumes of historical data and lower-cost, less frequently accessed data, allowing the system to expand affordably over time.

- **Data Processing Flexibility with Batch and Stream Processing**

A data lake architecture supports both batch processing (for historical data analysis) and stream processing (for near-real-time data ingestion). This allows CPD to adjust data ingestion speeds based on operational priorities without major infrastructure changes.

- **Enhanced Data Accessibility and Collaboration**

Data lakes support a wide range of tools and query options, which can make it easier for data analysts, data scientists, and other teams to access and analyze data directly. By centralizing diverse datasets in one location, CPD teams can more effectively collaborate and extract insights.

- **Foundation for Future Data Governance and Compliance**

A data lake can incorporate data governance tools that manage data quality, privacy, and compliance. This foundation will support future regulatory needs and ensure ongoing alignment with CJIS compliance and security requirements.

- **Scalable Infrastructure for Hybrid Cloud Integration**

Data lakes are compatible with hybrid cloud models, making it easier to store data locally or in the cloud as needed. This flexibility can accommodate future changes in CPD's cloud strategy without extensive system reconfiguration.

## Environment Setup

To support structured development, testing, and deployment processes, the solution will include three separate environments: Development, User Acceptance Testing (UAT), and Production.

- **Development Environment:** A dedicated space for initial setup, configuration, and code development. This environment allows for continuous integration and safe iteration on new features without impacting users.
- **User Acceptance Testing (UAT) Environment:** An isolated environment for stakeholders to validate functionalities and workflows against CPD's requirements. This environment enables rigorous testing and refinement to ensure solution reliability and performance before release.
- **Production Environment:** A secure, stable environment where the final, approved solution will operate. This environment is optimized for high availability and performance, supporting end users with minimal downtime.

## Key Dependencies

- **Data Accessibility:** Timely access to data from CPD's systems (RMS, CAD, and external sources) is essential for data ingestion. Delays in data availability may impact integration timelines.
- **Data Quality:** Source data should be accurate and complete to minimize data cleansing needs. Poor data quality could require additional work, potentially impacting timelines.
- **IT Team Support:** Availability of CPD's IT team is needed to assist with data access, compliance, and infrastructure setup. Limited support could slow down initial setup and troubleshooting.
- **Network and Security:** A strong, secure network is necessary for data transfers, especially for real-time data integration. Insufficient resources may lead to data transfer disruptions.
- **CJIS Compliance and Governance:** Clear guidelines on CJIS compliance and data governance are necessary. Gaps in requirements may require additional adjustments, impacting project timelines.
- **Provisioning of Azure Services:** Quick provisioning of Azure services (e.g., ADLS, SQL Database, Power BI) is needed to initiate the project. Delays here could affect the setup phase.
- **Tool and License Availability:** Access to ETL tools and Power BI for data processing and reporting is essential. Any licensing or access issues could disrupt the data workflow.
- **Stakeholder Readiness for Training:** Staff engagement in training and adapting to new tools is crucial for successful system adoption.
- **Role-Based Access Setup:** Timely setup of role-based access ensures data security. Delays in permissions setup could impact secure data access.
- **Budget and License Approvals:** Prompt approval of budget and licenses will keep the project on schedule. Any delays may impact timelines.

## Key Assumptions

- **Data Quality and Readiness:** Data from RMS, CAD, and geospatial sources is assumed to be in reasonably good quality, requiring minimal cleansing. CPD will address any major data discrepancies.
- **Access and Permissions:** CPD will provide necessary access and permissions for all data sources (SQL, flat files, APIs) at the project start. Delays in access may be flagged as risks.
- **IT Infrastructure Stability:** CPD's IT infrastructure is expected to support secure data transfers and maintain high availability. Network reliability is assumed; interruptions may delay integration.
- **Stakeholder Availability:** Key stakeholders, including analysts and IT personnel, will be available for inputs, UAT, and report validation. Limited availability could impact testing and refinement phases.
- **Consistent Data Volume and Sources:** Data volume and sources are assumed to remain stable throughout the project. Any significant changes could affect the data model and scope.
- **Availability of Test Data:** It is assumed that test data for each data source will be available as needed during data integration and report validation stages.

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## Project Plan

In this section, we cover our approach to executing this project. First, we create a phase-wise breakdown of our implementation plan,

### Phase 1: Assessment and Planning

In this foundational phase, we conduct a thorough assessment of CPD's data sources, current systems, workflows, and operational requirements. This phase helps ensure we have a complete picture before beginning implementation.

- **Actions:** Review CPD's data systems, including police records, CAD, GIS, and any external data sources, map out data flows, document data management gaps and outline integration points.
- **Deliverables:** A comprehensive project plan with timelines, resource allocation, and a roadmap aligned with CPD's goals.

### Phase 2: Data Ingestion and Integration Setup

This phase establishes data ingestion and integration processes, allowing data from various sources to be centralized and prepared for analytics.

- **Actions:**
  - Configure the ETL tool to connect to all relevant data sources, such as police records, CAD, and third-party systems.
- **Deliverables:** Operational data ingestion pipelines for data sources, ensuring CPD has a consolidated view of its data.

### Phase 3: Data Storage and Processing

With data flowing into the system, we focus on setting up a centralized data repository and developing workflows to prepare data for analysis.

- **Actions:**
  - Configure a data lake to serve as the primary storage location for structured and unstructured data, allowing CPD to handle various data types in one repository.
  - Set up the Database as a structured storage environment, implementing ETL workflows to clean, transform, and load data for analysis and reporting.
- **Deliverables:** A structured and scalable data storage environment, complete with ETL workflows that ensure data is clean, consistent, and ready for analytics.

### Phase 4: Reporting and Visualization

In this phase, we build dashboards and set up automated reporting processes to provide CPD with easy access to insights and regular updates.

- **Actions:**
  - Develop interactive dashboards in Power BI to provide visualization of metrics, trends, and operational data relevant to CPD's needs.
  - Configure Power BI to automate daily, weekly, and monthly reports, allowing CPD staff to receive regular updates without manual processing.
- **Deliverables:** Customizable dashboards and automated reporting mechanisms that provide timely insights for operational and strategic decision-making.

### Phase 5: Security, Governance, and Compliance

This phase ensures CPD's new data system meets security, governance, and compliance standards.

- **Actions:**
  - Implement role-based access control using Azure Active Directory to manage user permissions, ensuring that only authorized personnel have access to sensitive data.
  - Use Azure Key Vault to manage encryption keys and sensitive information securely.
- **Deliverables:** A secure and compliant data system with established governance policies, ensuring CPD's data is protected and managed responsibly.

### Phase 6: User Training and Support

To ensure CPD staff can operate and maintain the new system effectively, this phase focuses on training and support.

- **Actions:** Conduct training sessions for CPD personnel, covering system use, data management, and report generation. Provide ongoing support resources to address any future questions or issues.
- **Deliverables:** A fully trained CPD team capable of using the new system independently, with support channels in place for continued assistance.

## Project Timelines, Milestones & Team Structure

### Key Project Milestones

1. **Project Kickoff & Requirement Gathering**
  - Objective: Establish project goals, define roles, and gather specific data and reporting requirements from CPD stakeholders.
  - Deliverables: Project charter, finalized requirements document, and data source inventory.
2. **Data Architecture & Infrastructure Setup**
  - Objective: Design the data architecture and set up the infrastructure needed for data integration, storage, and processing.
  - Deliverables: Data architecture blueprint, environment configuration, and initial security setup.
3. **Data Modeling & Storage Design**
  - Objective: Develop a structured data model and design the storage solution to ensure efficient data retrieval and analytics.
  - Deliverables: Data model documentation, schema designs for fact and dimension tables, and storage configuration.
4. **Data Ingestion & ETL Pipeline Development**
  - Objective: Build ETL pipelines for data ingestion and transformation, enabling data from RMS, CAD, and other sources to be integrated securely.
  - Deliverables: ETL workflows, data transformation logic, and pipeline automation.
5. **Report and Dashboard Development**
  - Objective: Develop initial dashboards and reports in Power BI, focusing on key metrics and analytics required by CPD.
  - Deliverables: Interactive dashboards, draft reports, and visualization templates.
6. **Quality Assurance (QA)**
  - Objective: Test data accuracy, pipeline functionality, and report performance to ensure they meet CPD's standards.
  - Deliverables: QA test results, feedback documentation, and issue log.
7. **User Acceptance Testing (UAT)**
  - Objective: Conduct UAT with CPD stakeholders to validate that the solution meets user requirements and expectations.
  - Deliverables: UAT feedback, issue tracking, and final approval.
8. **End-User Training & Documentation Preparation**
  - Objective: Prepare training materials and conduct training sessions to ensure CPD staff are equipped to use the system effectively.
  - Deliverables: Training guides, user manuals, and recorded tutorials.
9. **Deployment & Go-Live**

- Objective: Deploy the final solution to the production environment, completing final system checks and validation.
- Deliverables: Production-ready system, go-live checklist, and stakeholder sign-off.

#### 10. Post-Deployment Support & Optimization

- Objective: Provide initial support, address any issues post-launch, and optimize system performance based on real-time usage.
- Deliverables: Support log, performance improvements, and project close-out report.

### Project Timelines

This project timeline outlines the key milestones for delivering a data-driven solution over a 12-week period. It covers key phases such as discovery, infrastructure setup, data modeling, pipeline development & dashboard creation, culminating in deployment & post-launch support. Each phase is designed to ensure timely delivery, while flexibility is built into the process to accommodate adjustments or delays.

Milestone	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
1. Project Kickoff & Requirement Gathering	●	●	●									
2. Data Architecture & Infrastructure Setup	●	●										
3. Data Modeling & Storage Design		●	●	●								
4. Data Ingestion & ETL Pipeline Development			●	●	●	●	●	●				
5. Initial Report and Dashboard Development					●	●	●	●	●	●		
6. Quality Assurance					●	●	●	●	●	●		
7. UAT											●	
8. End-User Training & Documentation Prep								●	●	●		
9. Deployment & Go-Live											●	
10. Post-Deployment Support & Optimization												●

Table 3 : Project's Milestone Plan

### Team Structure

We propose a hybrid team model to ensure optimal resource utilization across various geographies. The table below covers the proposed team, & further down in the section we cover responsibilities of each role.

Role	Location
Architect	Onshore
Business Analyst	Onshore
Project Manager	Offshore
Business Analyst	Offshore
Technical Lead + DM	Offshore
BI Engineer (Reports)	Offshore

Data Engineer (ETL)	Offshore
DevOps Engineer	Offshore
Test Engineer	Offshore
Training & Tech Writer	Offshore
Azure Engineer	Offshore
Web Form Developer	Offshore
Misc (Analysis/Doc/Infra/Leaves)	Offshore

Table 4 : Proposed Team Structure

## Key Responsibilities

### Architect (Onshore)

- Define overall system architecture and design.
- Ensure CJIS compliance and data security standards.
- Lead technical decision-making and provide guidance on integration, scalability, and redundancy.
- Collaborate with stakeholders to align system design with business objectives.

### Business Analyst (Onshore)

- Gather and document detailed functional and non-functional requirements.
- Act as a liaison between CPD stakeholders and the development team.
- Validate requirements and ensure alignment with project goals.
- Support UAT and facilitate requirement adjustments as needed.

### Project Manager (Offshore)

- Oversee project timelines, deliverables, and budget.
- Coordinate communication across onshore and offshore teams.
- Track project milestones and report progress to stakeholders.
- Manage risk assessment and mitigation throughout the project lifecycle.

### Technical Lead + Delivery Manager (Offshore)

- Provide technical oversight and ensure alignment with architectural standards.
- Manage the offshore development team, including task allocation and performance tracking.
- Address technical challenges and oversee quality control.
- Coordinate deployment and release schedules with DevOps.

### BI Engineer (Reports) (Offshore)

- Design and develop reports and dashboards in PowerBI and ArcGIS.
- Implement role-based access to reports for internal and external users.
- Optimize report performance and provide visualization insights for stakeholders.
- Collaborate with Business Analysts to align reports with user requirements.

### Data Engineer (ETL) (Offshore)

- Build and maintain ETL pipelines to integrate data from multiple sources.

- Automate data cleaning and standardization processes.
- Ensure data accuracy and reliability within the centralized data warehouse.
- Support data extraction, transformation, and loading tasks aligned with project needs.

**DevOps Engineer (Offshore)**

- Set up CI/CD pipelines for development, testing, and deployment.
- Implement and manage infrastructure for scalability and reliability.
- Ensure data security and compliance during deployment processes.
- Monitor system performance and support disaster recovery solutions.

**Test Engineer (Offshore)**

- Develop and execute test plans for functional, performance, and security testing.
- Conduct end-to-end testing, including UAT and regression testing.
- Document and track defects, ensuring timely resolution.
- Validate data accuracy, visualization functionality, and system performance.

**Training & Technical Writer (Offshore)**

- Develop training materials and technical documentation for system users.
- Create user guides, admin guides, and troubleshooting manuals.
- Conduct training sessions for administrators, power users, and end-users.
- Update documentation and training materials based on feedback and system changes.

# Project Management Methodology

## Account Management

Our account management strategy is meticulously designed to ensure the successful delivery of the project, aligning closely with the client's goals and expectations. Our dedicated team will be the cornerstone of this approach, ensuring seamless communication, meticulous resource management, and timely delivery of all project milestones.

## Weekly Touchpoint Calls

- **RAID Matrix (Risks, Assumptions, Issues, Dependencies):**
  - **Risks:** Identification and assessment of potential risks, developing mitigation strategies to prevent or minimize impact.
  - **Assumptions:** Documenting and validating assumptions to ensure project plans are realistic and achievable.
  - **Issues:** Tracking and resolving issues promptly to avoid delays and ensure project continuity.
  - **Dependencies:** Managing interdependencies between tasks and teams to ensure smooth workflow and timely completion of project deliverables.
- **Continuous Feedback Sessions:**
  - **Client Satisfaction Surveys:** Regular surveys to capture client feedback and satisfaction levels.
  - **Feedback Analysis:** Systematic analysis of feedback to identify areas for improvement.
  - **Action Plans:** Developing and implementing action plans based on feedback to enhance project outcomes.

## Project Governance and Communication

Our project governance structure is designed to ensure robust oversight, accountability, and seamless communication throughout the project lifecycle. The governance framework includes clearly defined roles, responsibilities, and communication protocols, ensuring that all stakeholders are aligned and informed.

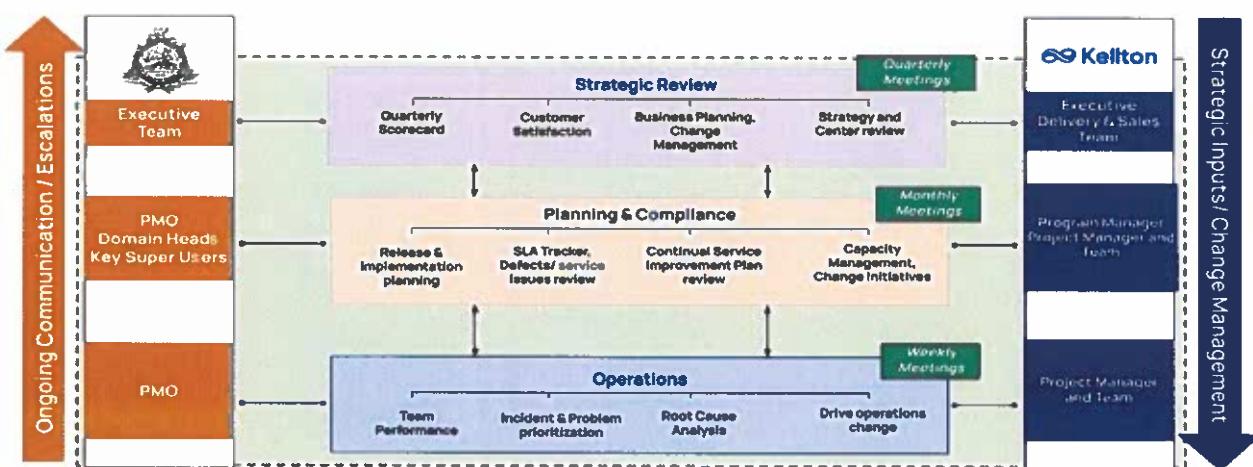


Diagram 10 : Project Governance Structure

## Communication Plans

- **Daily Stand-ups:**
  - Objective: Foster team cohesion, ensure alignment, and address any immediate concerns.
  - Participants: Project Manager, Onshore and Offshore Team Leads, Key Team Members.
  - Agenda: Progress updates, blockers, priorities for the day.
- **Weekly Progress Meetings:**
  - Objective: Comprehensive review of project status, progress, and challenges.
  - Participants: Project Manager, Account Manager, Onshore and Offshore Team Leads.
  - Agenda: Detailed progress report, issue resolution, next steps, and action items.
- **Monthly Steering Committee Meetings:**
  - Objective: Strategic oversight, risk management, and high-level decision-making.
  - Participants: Client Executive Sponsor, Client Project Sponsor, Project Governance Committee.
  - Agenda: Project health check, risk assessment, strategic decisions, resource allocation.
- **Quarterly Business Reviews:**
  - Objective: Align project outcomes with business objectives, recalibrate project plans if necessary.
  - Participants: Client Executive Sponsor, Client Project Sponsor, Account Manager, Project Manager.
  - Agenda: Review of project performance, alignment with business goals, strategic adjustments.

Communication Type	Audience	Purpose	Frequency
Kick-off Meeting	All Stakeholders	Initiate the project and set expectations	Once
Weekly Status Meetings	Project Team, Client PM	Review progress, discuss issues	Weekly
Monthly Steering Committee Meetings	Senior Management, Project Sponsor	High-level project review and decisions	Monthly
Status Reports	Client PM, Senior Management	Provide detailed progress updates	Bi-weekly
Milestone Reviews	All Stakeholders	Review completion of project phases	End of Each Phase
Ad-hoc Meetings	Relevant Stakeholders	Address urgent issues or changes	As needed
Final Project Review	All Stakeholders	Review project outcomes and lessons learned	End of Project

Table 5 : Communication Plan

## Delivery Framework

### Purpose of our Framework

- To equip a team with the necessary skills and resources to navigate the complexities of software development projects successfully.
- Offering guidance on implementing our framework to enhance productivity and elevate software quality.
- Additionally, we aim to cultivate a culture of collaboration, transparency, and continuous improvement across project teams.

### Evolution

Our framework has undergone significant evolution, marked by key milestones that reflect our commitment to learning and enhancement. Some notable milestones include:

- Embracing Agile methodologies to foster iterative and collaborative development approaches.
- Implementing Continuous Integration/Continuous Deployment (CI/CD) pipelines for automated testing and deployment.
- Integration of industry best practices in coding standards, testing strategies, and project management methodologies.

### Methodology

Aligned with Agile principles, our methodology prioritizes iterative development, frequent feedback loops, and adaptive planning. Core practices encompass:

- Conducting Scrum ceremonies such as Sprint planning, daily stand-ups, sprint reviews, and retrospectives.
- Utilizing Agile artifacts like the Product backlog, sprint backlog, user stories, and burndown charts.



Diagram 11: Project Management Process

### Lifecycle Stages

Our software development lifecycle spans the following stages:

- Planning: Defining project scope, objectives, and requirements.
- Analysis: Gathering and analyzing user requirements while prioritizing features.
- Design: Crafting system architecture, database schema, and UI mock-ups.

- Development: Writing code, implementing features, and conducting code reviews.
- Testing: Executing unit tests, integration tests, system tests, and User Acceptance Testing (UAT).
- Deployment: Releasing software to the production environment and monitoring performance.
- Maintenance: Providing ongoing support, addressing bugs, and implementing updates.

## Communication and Collaboration

Effective communication and collaboration are essential for project success:

- Communication Channels: Utilize Slack channels, team meetings, and email for regular communication.
- Collaboration Tools: Use collaborative tools like Google Docs, Confluence for shared documentation and knowledge sharing.

## Stakeholder Engagement and Governance

- Develop effective stakeholder engagement plans to ensure alignment and support throughout the project.
- Implement governance structures to provide oversight and decision-making authority.
- Establish clear program reporting mechanisms to keep stakeholders informed of progress and issues.

## Interaction Channels

- All important stakeholder collaboration and cadences will be in-person.
- The primary mode of digital communication will be Teams/Zoom meetings for remote cadences.
- We will also use Email / SharePoint / Jira / Google Cloud Docs.
- All approvals will be done mandatorily by email.
- Minutes of all meetings between Kellton Tech, Inc and City of Charleston will be followed up with a written MOM. This will then be shared with the City team to ensure a common understanding of the points discussed and the actions to be taken.

## Assessment and Planning

- Conduct a thorough assessment of organizational vision, objectives, and current infrastructure.
- Develop a comprehensive program schedule and project plans outlining key milestones and timelines.
- Establish strategic planning, alignment documentation to ensure project goals align with organizational objectives.

## Stakeholder Engagement and Governance

- Develop effective stakeholder engagement plans to ensure alignment and support throughout the project.
- Implement governance structures to provide oversight and decision-making authority.
- Establish clear program reporting mechanisms to keep stakeholders informed of progress and issues.

As has been articulated above, we believe that robust methodologies pave the way for successful project executions. Our experience in implementing tailored data solutions (as articulated in the previous sections) has yielded repeatable methodologies that form the core of our execution and delivery. Additional methodologies are outlined in the Appendix sections below:

- [Appendix A: Our Data Governance Methodology](#)
- [Appendix B: Kellton's Accelerator Frameworks](#)

*Please continue to the next page.*

## Engagement Cost

As recommended in the RFP document, cost is included in a separate file on the flash drive

## Client References

### Reference 1

Name of organization:	Regional Management Corp.
Name & designation of Contact:	Mark G Dicarlo (Vice President Software Engineering)
Address:	979, Batesville Rd B, Greer, SC 29651
Phone/Fax:	(443) 340 9341
Email:	mdicarlo@regionalmanagement.com
Similarity Index	High
Services Provided	<ul style="list-style-type: none"> <li>● Data Integration</li> <li>● Data Storage and Management</li> <li>● Data Processing and Analysis</li> <li>● Data Visualization</li> <li>● User Access and Security</li> </ul>

### Reference 2

Name of Organization:	Imagine Homes LLC
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Phone/Fax:	(312) 505 4939
Email:	jon@imagine-homes.com
Similarity Index	High
Services Provided	<ul style="list-style-type: none"> <li>● Data Integration</li> <li>● Data Storage and Management</li> <li>● Data Processing and Analysis</li> <li>● Data Visualization &amp; Reporting</li> <li>● Training and Support</li> </ul>

### Reference 3

Name of Organization:	Boston Consulting Group
-----------------------	-------------------------

Name & designation of Contact:	Shashank Shekhar (Senior Partner)
Address:	2501 N Harwood St Suite 2300, Dallas, TX 75201
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Email:	shekhar.shashank@bcg.com
Similarity Index	Medium
Services Provided	<ul style="list-style-type: none"> <li>● GenAI-LLM Implementation</li> <li>● Data Collection</li> <li>● Data Integration</li> <li>● Data Storage and Management</li> <li>● Data Processing and Analysis</li> <li>● User Access and Security</li> </ul>

Reference 4	
Name of Organization	Continental Tires
Name & designation of contact:	Noaman Sayed (Digital Transformation Manager)
Address:	Continental Middle East DMCC Jumeirah Lakes Towers - Cluster Y, Jumeirah Business Center 3, 4th Floor P.O. Box 336519, Dubai, United Arab Emirates
Phone/Fax:	
Email	noaman.sayed@conti.de
Similarity Index	High
Services Provided	<ul style="list-style-type: none"> <li>● Data Collection</li> <li>● Data Integration</li> <li>● Data Storage and Management</li> <li>● Data Processing and Analysis</li> <li>● Data Visualization</li> <li>● Reporting</li> <li>● User Access and Security</li> <li>● Training and Support</li> </ul>

**Reference 5**

Name of Organization	Touch Health
Name & designation of contact	Samy Ellouze (Sr Project Manager)
Address	Gusa Afya Kenya P.O.Box 12263, G.P.O. Nairobi, Kenya
Phone number	+ 254 712 625 303
Email	sellouze@touchhealth.org
Similarity Index	Medium
Services Provided	<ul style="list-style-type: none"> <li>● Data Integration</li> <li>● Data Processing and Analysis</li> <li>● Data Visualization, Interactive Dashboards</li> </ul>

## Appendix A : Our Processes, Frameworks & Methodologies

### Data Governance

#### Objectives of Data Governance

- Ensure Data Quality: Maintain the accuracy, consistency, and completeness of data.
- Enhance Data Security: Protect data from unauthorized access, breaches, and misuse.
- Ensure Compliance: Adhere to legal and regulatory requirements related to data
- Facilitate Effective Data Management: Streamline processes for data handling, integration, and usage.
- Promote Accountability: Define roles and responsibilities for data management.

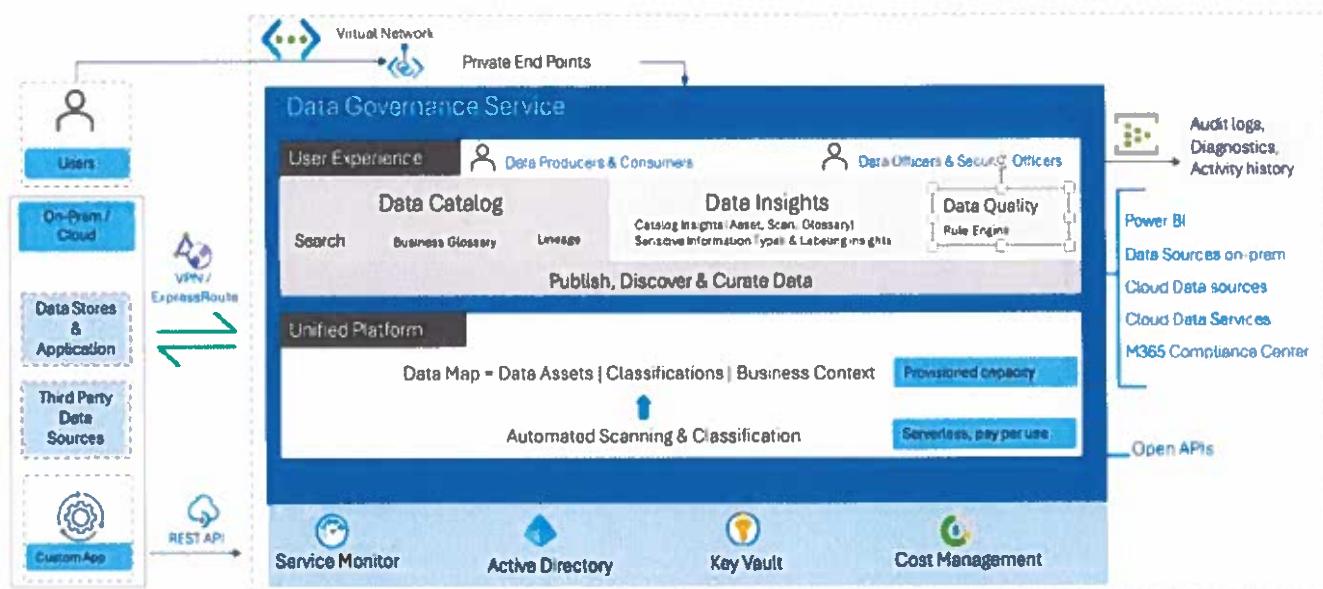


Diagram 12 : Enterprise Data Governance Architecture

#### Key Components

- Data Governance Framework: A structured approach that defines roles, processes and responsibilities for managing data. It includes different steps such as governance structure, policies, and procedures.
- Data Policies: Guidelines that govern how data is managed, including data quality, security, privacy, and usage.
- Data Catalog: An inventory of data assets that includes metadata, data definitions, and relationships. It helps in data discovery, management, and compliance.
- Data Stewardship: Assigns responsibility for managing data quality and integrity. Data stewards ensure that data is accurate, accessible, and secure.

#### Governance Processes

- Data Quality Management: Implement processes and standards to ensure data accuracy, consistency, and reliability.

- Data Security Management: Establish security measures, including access controls, encryption, and monitoring to protect data.
- Compliance Management: Develop practices to ensure adherence to data-related regulations and standards.
- Data Lifecycle Management: Manage data from creation to disposal, including storage, archiving, and deletion.

## Data Catalog

Data Catalog will be designed and implemented considering the following aspects:

- Data Classification - The process of categorizing data is based on its sensitivity, criticality, and regulatory requirements. This classification is to manage and protect data assets.
- Data Discovery and Search - Intuitive search capabilities allow users to easily find relevant datasets, tables, files, or data sources based on keywords, tags, attributes, or categories.
- Metadata Management - Centralized repository for storing and managing metadata about data assets, including descriptions, schemas, lineage, ownership, quality metrics, data dimensions and usage statistics.
- Data Lineage and Impact Analysis - Visualization tools to trace the lineage of data assets, showing their origins, transformations, and dependencies across the data ecosystem. Impact analysis to assess the potential impact of changes to data assets on downstream processes and reports.
- Data Profiling and Quality Assessment - Automated data profiling to analyze the structure, patterns, and quality of data, identifying issues such as missing values, outliers, and inconsistencies. Data quality assessment tools to measure and monitor data quality metrics such as completeness, accuracy, consistency, and timeliness.
- Collaboration and Knowledge Sharing - Collaboration features allowing users to annotate, comment, tag, and share insights about data assets, facilitating knowledge sharing and collaboration among data users, stewards, and owners. Support for data governance policies and processes, including data classification, data stewardship, and compliance with regulatory requirements such as GDPR, CCPA, HIPAA, or industry-specific regulations. Role-based Access Control (RBAC) mechanisms to manage permissions and ensure secure access to sensitive or restricted data assets, should be deployed.
- Integration and Interoperability - Integration with other data management tools and platforms such as data integration, data preparation, analytics, and visualization tools, enabling seamless interoperability within the data ecosystem.
- Customization and Extensibility - Customization options to tailor the data catalog to specific organizational requirements, workflows, and user preferences. Extensibility through APIs, plugins, or custom development to extend the functionality of the data catalog and integrate with third-party applications or services.
- User Experience and Accessibility - Intuitive user interface with interactive dashboards, visualizations, and navigation tools to enhance user experience and promote adoption. Accessibility features to ensure that the data catalog is usable by individuals with disabilities and complies with accessibility standards.
- Monitoring and Reporting - Monitoring capabilities to track usage, performance, and health of the data catalog infrastructure, providing insights into user activity, system performance, and data

usage patterns. Reporting tools to generate customized reports and dashboards summarizing metadata, data quality metrics, usage statistics, and compliance status.

- Data Governance and Compliance- Support for data governance policies and processes, including data classification, data stewardship, and compliance with regulatory requirements such as GDPR, CCPA, HIPAA, or industry-specific regulations. Role-based Access Control (RBAC) mechanisms to manage permissions and ensure secure access to sensitive or restricted data assets, should be deployed.
- Integration and Interoperability - Integration with other data management tools and platforms such as data integration, data preparation, analytics, and visualization tools, enabling seamless interoperability within the data ecosystem.
- Customization and Extensibility - Customization options to tailor the data catalog to specific organizational requirements, workflows, and user preferences. Extensibility through APIs, plugins, or custom development to extend the functionality of the data catalog and integrate with third-party applications or services.
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- Monitoring and Reporting - Monitoring capabilities to track usage, performance, and health of the data catalog infrastructure, providing insights into user activity, system performance, and data usage patterns. Reporting tools to generate customized reports and dashboards summarizing metadata, data quality metrics, usage statistics, and compliance status.

### **Data Policies and Procedures**

Data policies and procedures to govern data asset management, covering rules, standards, and best practices for data collection, storage, access, sharing, retention along with considering the following aspects.

- Data Classification – Implement data classification policy to systematically organize the company's stored information based on its sensitivity levels, ensuring proper data handling, reducing risks, and strengthening security measures.
- Data Access and Security - Implement data access procedures based on their needs, establishing protocols for accessing data and authentication mechanisms such as passwords or biometrics. Define authorization protocols for user roles and permissions, ensuring compliance with policies and regulations, managing access privileges, and monitoring data access activities to maintain security and integrity.
- Data Quality Management - Developing the data quality management program to ensure that the integration of organizational culture, technology, and data produces precise and valuable outcomes in data quality management.
- Data Retention and Archiving - Create data retention and archiving policies to meet employer requirements, keeping data for specific periods based on legal, regulatory, and business needs. They classify data by sensitivity, set retention periods, and create secure disposal procedures. Compliance with laws, thorough documentation, and audits ensure adherence to policies, reducing legal and regulatory risks.

- Data Privacy and Compliance - Deploying effective data access control, leveraging tools and policies, provided by data protection to proficiently manage access to the data. It is essential for the successful proponent to strategize compliance regulations, ensuring that companies fulfill user privacy requests. Furthermore, the successful proponent is obligated to assist the companies to take proactive measures to safeguard private user data.
- Data Usage and Sharing - Establishing policies that govern the sharing of data with both internal and external parties. The successful proponent must create confidentiality agreements and data sharing agreements to regulate the sharing of sensitive information. Responsibilities include ensuring compliance with legal and regulatory requirements, maintaining the confidentiality of data, and establishing clear guidelines for data sharing practices.
- Data Breach Response - Create protocols to handle data breaches efficiently. The successful proponent establishes procedures to identify and assess breaches, notify stakeholders promptly, and take remedial actions to reduce damage. Responsibilities include developing response plans, conducting training, ensuring compliance, and documenting breaches to improve future prevention and enhance security.
- Data Monitoring and Auditing - Business data meets quality control rules to maintain high quality and compliance with established standards.

**Data Stewardship** - Define the "Data stewardship" management roles and oversight of an organization's data assets by designated individuals or teams known as data stewards. These stewards are responsible for ensuring that data is effectively managed, protected, and used in alignment with the organization's goals.

## Quality Assurance & Defect Management

Our comprehensive quality process encompasses multiple stages, from initial planning to final delivery, guaranteeing that every aspect of the project meets or exceeds client expectations.

### Planning

- **Quality Management Plan:** Development of a detailed plan outlining quality objectives, standards, roles, responsibilities, and processes.
- **Standards and Metrics:** Establishment of clear quality standards and metrics to measure performance and outcomes.
- **Quality Tools and Techniques:** Selection of appropriate tools and techniques for quality control and assurance.
- **Dynamic and Unplanned Testing Activities:** Engaging in dynamic and unplanned testing activities to identify potential issues early.
- **As-Is Analysis:** Conducting a thorough analysis to identify current loopholes and strengths.
- **Current Governance Structure:** Reviewing the existing governance structure to understand the baseline.
- **To-Be State Identification:** Identifying the desired future state to guide quality improvements.

### Exploratory Testing

- Conducting exploratory testing to uncover defects and areas for improvement that may not be covered by traditional testing methods.

- Collaborating with developers to identify and rectify issues at an early stage through buddy testing.
- Requirement Analysis
- Collaborating with stakeholders to understand and analyze requirements comprehensively.
- Defining queries, registering them, and identifying potential gaps in requirements.
- Developing test strategies, including device matrix, test plans, and QA release plans.
- Understanding the release plan and identifying involved teams.
- Setting a governance framework to ensure structured and effective quality processes.

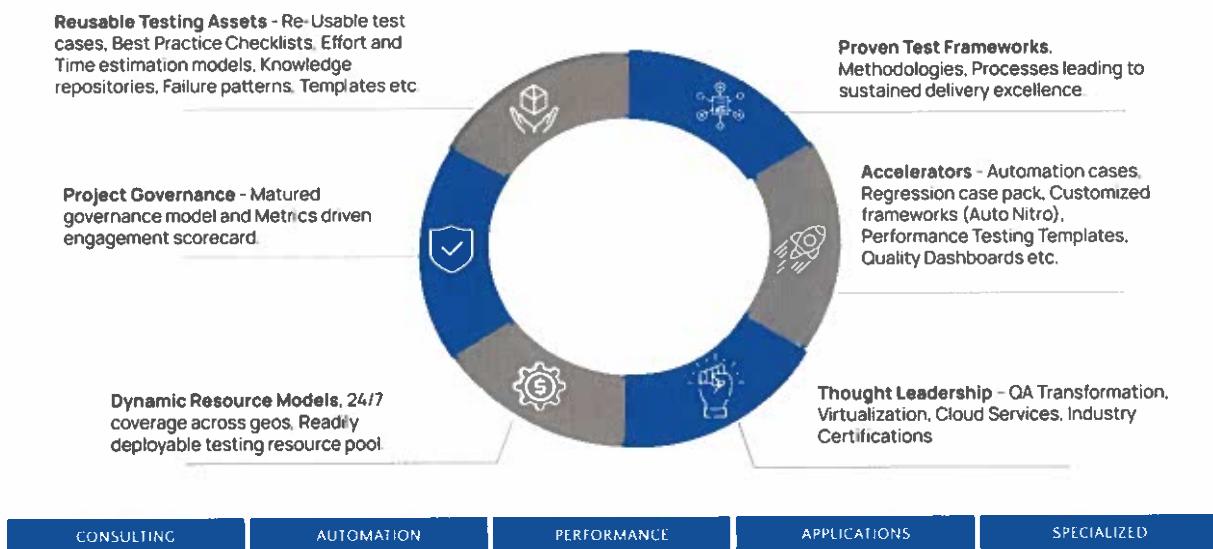


Diagram 13: Our QA Process's Key Differentiators

## Maintenance

- Establishing stakeholder alignment and collaboration through a cross-functional team with representatives from development, testing, and operations.
- Implementing Agile methodology, communication plans, and documentation standards.
- Conducting regular meetings and feedback sessions to manage risks and ensure continuous improvement.
- Providing training and onboarding for new team members and tracking performance metrics.

## Testing and Integration

- Executing comprehensive testing activities, including:
- Requirement Traceability Matrix (RTM)
- Test cases (manual and automated)
- API testing
- Security testing
- Performance testing
- User Acceptance Testing (UAT)
- Execution, reporting, and bug tracking

Implementing integration processes to ensure seamless functionality and performance.

### Implementation

- **Shift Left Testing:** Promoting the incorporation of quality considerations from the project's outset.
- Facilitating the adoption of testing practices in the early stages of development to identify and address issues promptly.

### Quality Reporting

- Generating regular quality reports to provide stakeholders with insights into quality performance and areas for improvement.
- Conducting root cause analysis for any significant defects or issues to prevent recurrence.
- Incorporating client feedback into quality processes to align outcomes with client expectations.

### QA Tools

Type	Tools
Manual	Testlink, Browser Stack, JIRA
API	Postman, Soap UI, REST - Assured, Katalon, Playwright
Security	Burp Suite, sqlmap, ZAP, Geny motion
Mobile Automation	Appium, Playwright
Web Automation	Playwright, Selenium
Performance	Grafana, Perform, Apache JMeter, Blaze meter
Desktop Application Framework	Playwright, WebDriverIO

## Risk & Issue Management

Project risk refers to the probability of an undesirable event occurring that negatively impacts the overall progress or completion of a project. The risk management process involves the following key activities:

- **Initial Risk Assessment:** Conducted at the project's outset, this assessment is based on historical data, conflicting or competing initiatives, and other organizational environmental factors.
- **Individual Risk Identification and Management:** Ongoing identification and management of risks throughout the project lifecycle to address issues as they arise.
- **Risk Closure:** Implementation of mitigation and/or contingency plans to resolve identified risks.

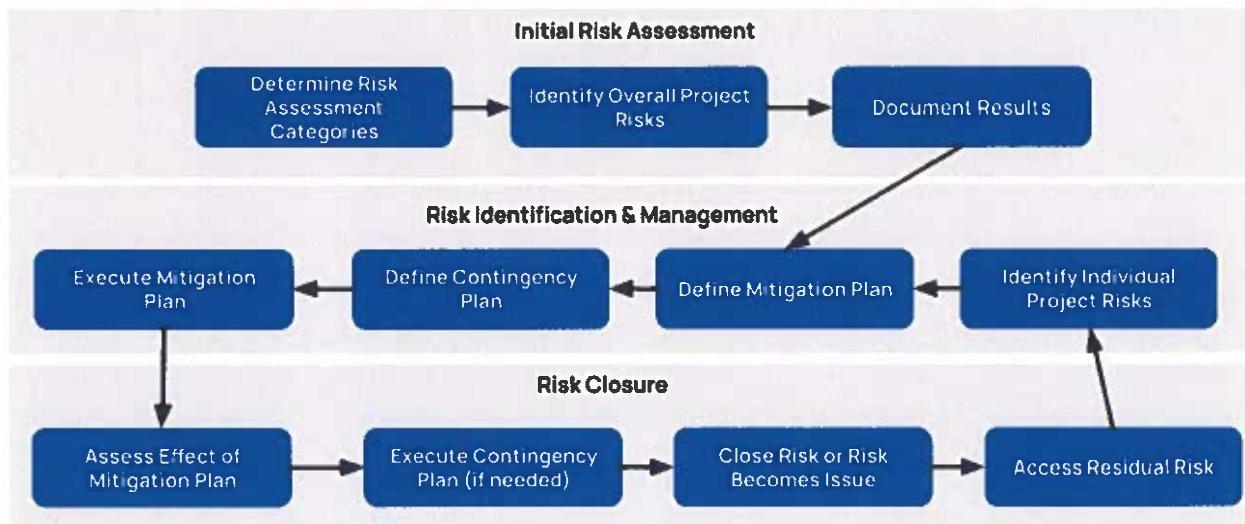


Diagram 14 : Risk Management Process

Issue Management is a structured process designed to identify, document, track, and resolve issues throughout the project lifecycle.

During the project, issues may arise that are beyond the immediate resolution capacity of the project team. Additionally, the team requires a mechanism to capture the decisions or resolutions made regarding these issues.

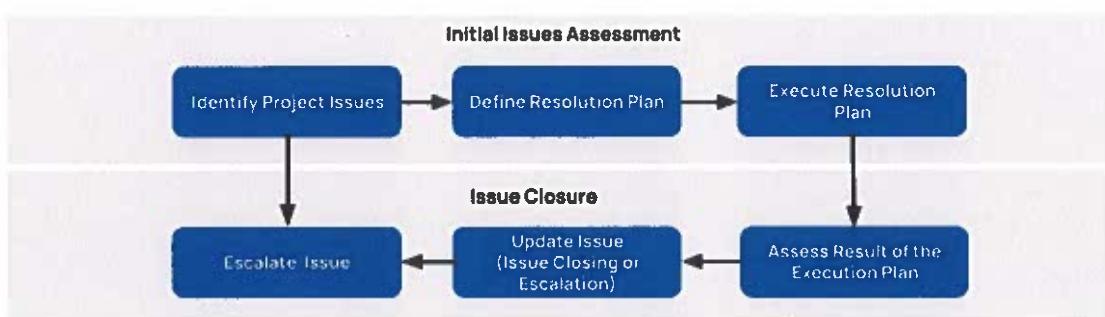


Diagram 15 : Issue Management Process

## Approach

The Issue Management process involves the following steps:

- **Identifying and Logging Issues:** Documenting issues as they arise.
- **Prioritizing Issues:** Establishing clear guidelines for issue priorities (e.g., showstopper/executive, high, medium, low).
- **Assigning Issues:** Designating responsible individuals for resolving issues and performing necessary impact analysis.
- **Tracking and Reporting Status:** Monitoring issues by tracking their status, including aging, open/closed status, and resolution progress.
- **Escalating Issues:** Defining the timeframe for escalating issues to the next level, up to the executive committee, if they remain unresolved.

The goal is to minimize the backlog of unresolved issues, ensuring the lowest possible impact on the project.

## Procedure

- **Raising Issues:** Any project stakeholder, including team members, the client, third-party integrators, or vendors, can raise issues.
- **Recording Complex Issues:** Complex issues will be detailed on an Issue Form and, if they also represent a risk, logged accordingly.
- **Logging Issues:** Issues will be entered into the Issue Log, categorized by type and priority, and assigned an estimated closure date.
- **Investigation and Documentation:** The Project Manager will investigate the issue and, if necessary, update the Issue Log with relevant background information.
- **Assigning Ownership:** Once documented, each issue will be assigned to an owner responsible for its resolution.
- **Estimating Impact:** The impact on schedules and costs will be estimated for each solution, along with any recommendations.
- **Change Control:** If change control is required, the Issue Form will be submitted as part of the Change Control process for background information.
- **Resolution without Impact:** If the issue can be resolved without affecting contractual obligations, the Project Manager will sign off on the Issue Log.
- **No Action Taken:** Any issues with no action taken must be clearly indicated in the Issue Log.
- **Escalation:** If an issue cannot be resolved, it must be escalated to senior management for resolution.

As a best practice, the Kellton's Project Manager will discuss open issues in project status meetings, including executive steering committee meetings, and make an effort to put a "hard closure" on all open issues.

## Change Management

Effective change management is critical to the success of any project, ensuring that changes are managed systematically and with minimal disruption to project progress. Our change management process is designed to handle changes efficiently and transparently, ensuring stakeholder alignment and project continuity.

**Change Management Framework:**

- **Change Management Plan:** Development of a comprehensive plan outlining change management processes, roles, responsibilities, and communication strategies.
- **Change Control Board (CCB):** Establishment of a Change Control Board to review, approve, and prioritize change requests.

**Change Identification and Documentation:**

- **Change Request Form:** Use of standardized change request forms to capture detailed information about proposed changes.
- **Impact Analysis:** Conducting thorough impact analysis to assess the potential effects of proposed changes on scope, schedule, cost, and quality.
- **Stakeholder Consultation:** Engaging relevant stakeholders to gather input and ensure alignment on proposed changes.

**Change Approval and Implementation:**

- **Review and Approval:** Structured review and approval process by the Change Control Board, considering impact analysis and stakeholder input.
- **Implementation Plan:** Development of detailed implementation plans for approved changes, including timelines, resources, and risk mitigation strategies.
- **Communication:** Clear communication of approved changes to all stakeholders, ensuring transparency and understanding.

**Change Monitoring and Reporting:**

- **Change Log:** Maintenance of a change log to track all change requests, decisions, and implementation status.
- **Progress Monitoring:** Continuous monitoring of change implementation to ensure adherence to plans and timelines.
- **Reporting:** Regular reporting on change management activities, providing stakeholders with visibility into change status and impacts.

**Post-Implementation Review:**

- **Evaluation:** Conducting post-implementation reviews to evaluate the effectiveness of changes and identify lessons learned.
- **Feedback Integration:** Incorporating feedback from post-implementation reviews into future change management processes to enhance efficiency and effectiveness.

By integrating these structured quality and change management processes, we ensure the successful execution and completion of the project. This comprehensive approach aligns with the client's objectives, delivering exceptional value and ensuring client satisfaction.

## Appendix B : Accelerator Frameworks

Kellton has undertaken multiple projects on data migration. All the lessons learnt, customer pain points and bottlenecks during the execution therein have contributed to "accelerators", which can be thought of as tools, frameworks, or methodologies designed to speed up the process of migrating data and workloads to Snowflake, a cloud-based data warehousing platform. These accelerators typically aim to streamline the migration process, reduce risks, minimize downtime and human error due to iterative tasks. While these are typically an outcome of Snowflake migrations, they are applicable to all projects that involve data migration. Below is the list of Kellton's migration accelerators:

### DDL Conversion Automation

Utility facilitates schema conversion using python scripts. that assist in converting database schemas of SQL Server Database syntax to Snowflake supported database syntax including name, datatype and length. This helps in reducing manual effort and ensures compatibility.

- Collect the source data definitions (DDL)
- Reads the conversion metadata set in the configuration files
- Apply the conversion of Source DDL to snowflake format DDL
- Directly execute DDL on snowflake OR Create a DDL script in given folder

### Migration Methodologies

As the technology and architectures are continuously changing to support complex data and analytic demands. Kellton has executed multiple migration projects such as database migration, ETL migration and Report migration. We have designed the Frameworks and best practices that guide organizations through the migration process. These methodologies include detailed steps for assessment, planning, execution, and validation of the migration.

Kellton understands the importance of data profiling, data quality and data analysis, which are key to any successful migration. We have built a Digital Data Twin (DDT) utility / framework using Python Scripts, Metadata Scripts and MySQL which helps in accessing the current estate and footprint and helps in post migration assessment of the migration. It also helps in identifying the data lineage to an extent which is needed for migration projects. Please check out <https://data.kellton.com/> for more information.

### Data Migration Automation

Kellton has built data migration automation using Python which uses a combination of libraries, frameworks, and best practices. This data migration automation using Python helps with ~70-80 % of seamless migration. The complex datasets or huge datasets can be done using ETL tools such as DBT or SSIS.

Data Migration is always underestimated as one-time history migration but during the project execution we might have to repeat history migration activity multiple times due to new discovery of information, change in data model, impact of consumer or even QA/UAT defect. So data migration automation always comes handy as these are configurable using metadata and runs can be scheduled, so during the project lifecycle we can execute the data migration on-demand or scheduled to run during off hours.

### Data Validation Automation

Kellton has built a data validation automation using Python and database to store configuration metadata, which uses a combination of libraries, frameworks, and best practices.

Quality Assurance on table structure, schema and data validation using metadata-driven parameters facilitated the data testing based on the type of data along with scenarios such as counts, distinct, aggregate, sampling vs full comparison, checksum. This automation solution compared the data till two decimal place accuracies. The schedule and automate feature also helped the data validation during off hours. Also, Continuous regression test execution in scheduled manner, published a data validation report with sample records of unmatched dataset for analysis has significantly improved productivity and delivery timelines

### **Key Considerations**

- Run parallel workloads on both the new and old systems during the cutover phase to thoroughly validate and certify the success of the migration.
- Ensure all downstream dependencies are accounted for in the project plan to prevent any potential issues.
- Implement automation for the entire migration process, including data validation and auditing, to enhance accuracy and efficiency.
- Schedule migration cutovers to coincide with monthly or quarterly business closures to minimize disruption to operations.
- Assign a dedicated owner responsible for certifying the success of the migration cutover, including defining crucial checkpoints throughout the process.
- Clearly define the success criteria for each phase and model of the migration to ensure precise and measurable outcomes.
- Identify key stakeholders for ETL, databases, and reporting to facilitate collaboration and swiftly address and remove any blockers.
- Recognize that migrations are often filled with interdependencies which can become blockers if not properly managed and addressed.
- Ensure that metrics and milestones are consistently reported and reviewed throughout the project lifecycle to maintain governance and transparency.

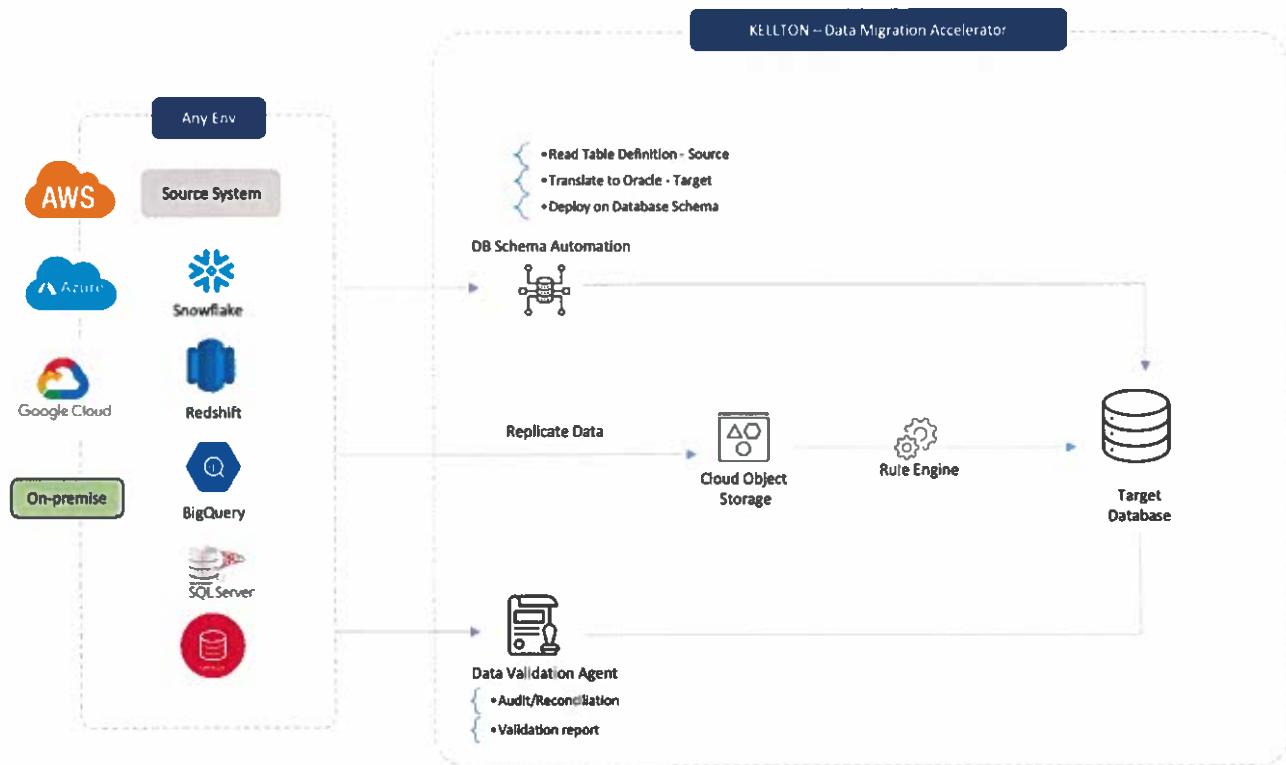


Diagram 16 : Data Migration Accelerator

Overall, these accelerators aim to reduce the time, effort, and risks associated with migrating to Snowflake, enabling organizations to leverage its cloud-native architecture and scalability more quickly and efficiently.

## Appendix C : Azure Monthly Licensing Cost Estimate

Note: All prices shown are in the United States - Dollar (\$) USD. This is a summary estimate, not a quote. For up to date pricing information please visit <https://azure.microsoft.com/pricing/calculator>.

### Microsoft Azure Price Estimates

Service category	Service type	Region	Description	Estimated monthly cost
Storage	Storage Accounts	East US	Data Lake Storage Gen2, Standard, ZRS Redundancy, Hot Access Tier, Hierarchical Namespace File Structure, 2 TB Capacity - Pay as you go, Write operations: 4 MB x 10 operations, Read operations: 4 MB x 10 operations, 10 Iterative read operations, 1,00,000 Archive High Priority Read, 10 Iterative write operations, 10 Other operations, 1,000 GB Data Retrieval, 1,000 GB Archive High Priority Retrieval, 1,000 GB Data Write, 100 GB Meta-data storage	\$59.34
Databases	Azure SQL	East US	Managed Instance, General Purpose, Single Instance, Gen 5, 4 vCore, Primary Instance, Compute redundancy - Locally Redundant, 1 instance(s) x 730 Hours, SQL license (Pay as you go), 128 GB Storage, Backup storage redundancy - ZRS, 10 GB Point-In-Time Restore, 100 GB Long Term Retention with 4 Weekly backup retention, 12 Monthly backup retention, 3 Yearly backup retention	\$795.92
Data Engineering	Azure Data Factory	East US	Azure Data Factory V2 Type, Data Pipeline Service Type, Azure Integration Runtime: 3 Activity Run(s), 60 Data movement unit(s), 60 Pipeline activities, 0 Pipeline activities - External, Self-hosted Integration Runtime: 3 Activity Run(s), 60 Data movement unit(s), 30 Pipeline activities, 0 Pipeline activities - External, Data Flow: 1 x 8 General Purpose vCores x 15 Hours, 0 x 8 Memory Optimized vCores x 730 Hours, Data Factory Operations: 5 x 50,000 Read/Write operation(s), 5 x 50,000 Monitoring operation(s)	\$65.40

Analytics	Power BI	East US	Power BI Pro license - 60 @USD 10/user/month Ref: Q & A document, Question No 97	\$600
Support		<b>Support</b>		\$100.00
		<b>Total</b>		<b>\$1,620.66</b>

Table 8 : Microsoft Azure Licensing Cost Estimate

Estimated Monthly Azure Subscription Cost = USD 1,620 (includes USD 600 / month @ USD 10/month/user for Power BI for 60 power users.

## Appendix D : Proposed Training Model

To ensure the City of Charleston Police Department (CPD) can efficiently utilize and manage the new analytics platform, we propose a comprehensive training model designed to equip CPD's internal team with the knowledge and tools they need for successful, independent operation.

### **In-Depth Training Sessions**

Our team will provide one week of intensive training to CPD's internal team, focusing on how to effectively use the platform's core functionalities, manage data, generate reports, and leverage analytical insights. This hands-on training will empower users to fully understand the platform's capabilities and maximize its benefits.

### **Training Content and Demonstrations**

We will develop detailed training content, including live demonstrations and recorded video tutorials, to guide users through the platform's features step-by-step. This content will serve as a valuable reference tool, allowing CPD's team to revisit training modules as needed for continuous learning and skill reinforcement.

### **Comprehensive Handbooks and User Manuals**

Our team will prepare handbooks and user manuals that cover every aspect of the platform, from initial setup to advanced data analysis techniques. These resources will include clear instructions, feature overviews, troubleshooting tips, and best practices to support CPD's team in navigating the platform with confidence.

By providing in-depth training, rich instructional content, and accessible manuals, our training model will ensure CPD's team is well-equipped to operate the new analytics platform independently and effectively.

## Appendix E : Proposed Application Support Model

Our proposed support framework is a flexible, collaborative model designed to align with the City of Charleston Police Department's (CPD) operational needs and resource requirements. Kellton will work closely with CPD to establish a predictable demand planning approach that anticipates resource requirements well in advance, ensuring smooth collaboration and operational continuity:

- Pre-Forecasting Window: Three months ahead, with monthly updates to reflect any changes.
- Detailed Planning Window: Two to four weeks in advance, with weekly updates for precise resource alignment.
- This phased approach enables us to anticipate demand shifts accurately and confirm our commitment to resource availability.

### Flexible Resourcing Model

Our resourcing strategy is designed to support both established project timelines and any fluctuating demands:

- **Core Resources:** A core team sized to meet forecasted demand, with SLAs to ensure timely fulfillment of roles and maintain high-quality resource selection.
- **Flexible Capacity (Flex):** Additional resources can be onboarded as needed to support new development initiatives.

### Comprehensive Support Framework

We propose a comprehensive support structure, staffed with a dedicated **Level 3 Support Team** to manage and resolve technical issues across all levels. This operation will be managed by a **Team Lead** responsible for ensuring seamless coordination, timely resolution of issues, and alignment with agreed SLAs.

- Our Engineering Team, which includes a **Data Engineer and a BI Engineer**, will be available to provide technical expertise, address ongoing system enhancements, and support advanced development requirements.
- Based on our current understanding of CPD's needs, we recommend a shared support model to maintain flexibility in resource allocation. However, as requirements evolve, we are open to scaling the team up or down based on CPD's demands. We can also pivot to a fully dedicated model if preferred.

This model ensures CPD has access to a highly adaptable, skilled support team capable of evolving with operational demands while maintaining service excellence and alignment with strategic objectives.

### Response SLA

To ensure timely responsiveness, our team will acknowledge all support requests within two hours during standard support hours (Eastern Standard Time business hours). This prompt response will ensure that issues are logged and evaluated quickly, setting the stage for effective problem resolution within designated support windows.

Team	Total Capacity	Track	Activities
Core	240 Hours	Support	<ul style="list-style-type: none"> <li>• Resolve data discrepancy in database and reports</li> <li>• Provide ad-hoc reports requested by business</li> <li>• Conduct impact assessment of changes in source data</li> <li>• Provide Root cause analysis for data issues and suggest Long term fixes</li> <li>• Collaborate with CPD IT team and adherence to policies on change management</li> <li>• Provide regular status reports</li> </ul>
Flex	On Demand	New Development / Enhancements	<ul style="list-style-type: none"> <li>• On demand addition of flex team members to expedite any new development or enhancement requirements</li> <li>• Additional of flex team are subject to approval of CPD IT Manager based on agreed rates and efforts</li> </ul>

Table 9 : Team Capacity Distribution

## Appendix F : About Kellton

### Footprints

Kellton is a globally trusted digital transformation company where innovation meets vision. We thrive on leveraging new technologies and transforming enterprises for a digital future in a breakthrough way.

From startups to Fortune 500 companies, we have provided end-to-end digital solutions to hundreds of clients across multiple business verticals and earned a distinguished position in the ecosystem.

Just like most companies, we started out small, driven by our ambitious founders on an incredible journey. And today, we have offices in the United States, Europe, and Asia, serving clients across diverse industries such as healthcare, finance, retail, and manufacturing.

**14+**

Years of Digital Excellence

**2000+**

Strong Curated Team

**200+**

Satisfied clients

**1000+**

Successful Projects Delivered

**50+**

Fortune 500 Clients Served



**CMMI Level 5 Certified**  
Kellton is a CMMI Level 5 Certified Company



**ISO 9001:2015**  
Kellton is a 9001:2015 Certified Company



**SOC 2 Compliant**  
Kellton is an SOC 2 Compliant



**NSE, BSE Listed**  
Public listed organization in INDIA

## Awards & Recognitions

Kellton is a respected technology leader, known for its commitment to innovation, talent development, and responsible business practices. Our expertise has been recognized through awards and acknowledgments from industry organizations, technology partners, and media outlets globally.





**The City of Charleston**  
**Procurement Division**  
75 Calhoun Street, Suite 3500  
Charleston, South Carolina 29401  
P) 843-724-7312 F) 843-720-3872  
[www.charleston-sc.gov](http://www.charleston-sc.gov)

**Proposal Number:** 24-P028R    **Proposals will be received until:** November 5, 2024 @ 1:00pm

**Proposal Title:** Comprehensive Data Analytics System

**Mailing Date:** October 3, 2024

**Direct Inquiries to:** Robin B. Robinson

**Vendor Name:** KelltonTech Solutions Inc

**FEIN/SS#:** 47-4003633

**Vendor Address:** 5600 Tennyson Parkway, Suite # 245,

**City – State – Zip:** Plano, TX 75024

**Telephone Number:** 732-820-9750

**Fax Number:** 877-800-9321

**Authorized Signature:**

**Title:** Operations Manager

**Date:** 11/04/2024

I certify that this bid is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies, equipment or services and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this bid for the bidder. **This signed page must be included with bid submission.**

**IMPORTANT**

1. This solicitation seeks proposals responding to the Scope of Work for **Comprehensive Data Analytics System**. This solicitation does not commit the City of Charleston to award a contract, to pay any costs incurred in the preparation of applications submitted, or to procure or contract for the services. The City reserves the right to accept or reject any, all or any part of any proposal received as a result of this Solicitation, or to cancel in part or in its entirety this Solicitation if it is in the best interest of the City to do so. The City shall be the sole judge as to whether proposals submitted meet all requirements contained in this solicitation.

*The City of Charleston, South Carolina has received funds from the Bureau of Justice Assistance, and are bidding these items utilizing the 2023 Smart Policing Initiative.*

2. Offeror may mail, or hand-deliver response to the Procurement Division. **Do Not Fax** in the proposal response. Please show the solicitation number on the outside of any mailing package. The City of Charleston assumes no responsibility for unmarked or improperly marked envelopes. If directing any other correspondence to the Procurement Division not related to the solicitation, please do not include the solicitation number on the envelope. If the Bidder chooses not to respond to this solicitation, it is recommended to return the "No Proposal Response Form" to our office.
3. **DEADLINE FOR SUBMISSION OF OFFER:** Any proposal or offer received after the Procurement Director or his designee has declared that the time set for opening has arrived, shall be rejected unless the offer has been delivered to the designated purchasing office or the governmental bodies' mail room which services that purchasing office prior to the proposal opening.
4. Questions regarding this solicitation **must be submitted in writing to Robin B. Robinson no later than 1:00pm on October 17, 2024**. Questions may either be faxed to 843-720-3872 or emailed to Robin B. Robinson, [robinsonr@charleston-sc.gov](mailto:robinsonr@charleston-sc.gov).

<b>Proposal Number:</b> 24-P028R	<b>Proposals will be received until:</b> November 5, 2024 @ 1:00pm
<b>Proposal Title:</b> Comprehensive Data Analytics System	
<b>Mailing Date:</b> October 3, 2024	<b>Direct Inquiries to:</b> Robin B. Robinson

### **CERTIFICATE OF FAMILIARITY**

The undersigned, having fully familiarized himself with the information contained within this entire solicitation and applicable amendments, submits the attached proposal, and other applicable information to the City, which I verify to be true and correct to the best of my knowledge. I further certify that this proposal response is made without prior understanding, agreement, or connection with any corporation, firm or person submitting a proposal for the same materials, supplies, equipment or services in all respects, fair and without collusion or fraud. I agree to proposal by all conditions of this solicitation and certify that I am authorized to sign this proposal. I further certify all prices submitted shall remain effective for a minimum period of ninety (90) days, unless otherwise stated.

Kellton Tech Solutions Inc

Company Name

As registered with the IRS

5600 Tennyson Parkway, Suite # 245,

Correspondence Address

Plano, TX 75024

City, State, Zip

shankar@kellton.com

Email

5600 Tennyson Parkway, Suite # 245,

Remittance Address

Plano, TX 75024

City, State, Zip

47-4003633

Federal Tax ID (FEIN)/SS Number



Authorized Signature

Shankara Pesalperthy

Printed Name

Operations Manager

Title

732.820.9750 x 503

Telephone Number/Toll Free Also (If Available)

877-800-9321

Fax Number

11/04/2024

Date

n/a

SC Sales Tax Number

***City of Charleston***  
***Procurement Division***  
75 Calhoun Street, Suite 3500  
Charleston, SC 29401



**ADDENDUM #1**

T: (843) 724-7314  
F: (843) 720-3872

**DATE:** October 23, 2024

**TO:** All Bidders

**FROM:** Robin B. Robinson

**RE:** 24-P028R – Comprehensive Data Analytics System

This addendum #1 to the solicitation is being made for the following reasons:

**The due date has been changed from November 5, 2024 at 1:00pm to November 19, 2024 at 1:00pm.**

If you have any questions, please feel free to call 843-724-7314. Thank you in advance for your cooperation.

  
Signature of Acknowledgement

11/13/2024

Date

Kellton Tech Solutions Inc

Company Name

**City of Charleston  
Procurement Division  
75 Calhoun Street, Suite 3500  
Charleston, SC 29401**



**ADDENDUM #2 Q&A**

T: (843) 724-7314  
F: (843) 720-3872

**DATE:** November 1, 2024  
**TO:** All Bidders  
**FROM:** Robin B. Robinson  
**RE:** 24-P028R – Comprehensive Data Analysis System

---

This addendum #2 to the solicitation is being made for the following reasons:

**1. Data Collection and Integration:**

- What are the main data sources that the Charleston Police Department (CPD) currently uses? Are they standardized across systems, or is there variability in formats and structures? 6 Enterprise level databases covering all LE needs and a number of access databases that supplement the others. There is variability.
- Could you clarify any real-time data integration requirements? Is there a need for low-latency streaming or will batch processing suffice for most data sources? Batch will suffice.

**2. Data Storage and Management:**

- Do you have a preferred platform for data storage, such as on-premises or cloud-based solutions (CJIS certified), or should the vendor recommend the best solution based on project requirements? Do you currently have a data warehouse? We will entertain best solutions. We do have a data warehouse though there will be need changes/restructuring.
- What is the expected volume of data to be ingested and stored annually, and how should the system scale in terms of storage and processing capacity? See Figure 1-A at the end of this document.

**3. Analytics and Reporting:**

- Can you describe the current level of analytics being performed? What advanced analytics capabilities (e.g., machine learning, geospatial analysis) are priorities for CPD, and how should they be incorporated into the new system? Currently geospatial and temporal. No machine learning though it would be helpful. Currently cross analyze multiple datasets to produce common picture analysis.
- What kinds of reports and dashboards are required, and who are the main stakeholders (internal vs. public) who will access these? Are there any specific

253. **Can you confirm the following statement is correct?**  
*"Bidders must provide either (a) Affidavits A and B or (b) Affidavit C. If a Bidder provides Affidavit C, the Bidder does not need to provide Affidavits A or C."* If you are providing Affidavit C, you will not need to provide Affidavits A and B.

254. **Will the City accept electronic notary like Notarize.com?** No.

255. **Do we need to include Certificate of Insurance as part of the submission?** That would be helpful, but it will be required from the awarded vendor upon contract negotiations.

256. **For "Relevant experience and case studies", is there a minimum and maximum number of case studies we are required to provide? Please provide at least one case study but include as many as necessary to fully demonstrate how you can best meet our needs.**

257. **Do we need to provide Audited Financial Statements within our response?** If yes, please confirm under which section we should include it.  
The City reserves the right to request this information, but we are not requesting it with the proposals at this time. We hold our right to request it from either shortlisted or awarded vendor.

258. **Is the City referring to the front page of the solicitation form as a cover page? If yes, does that mean the offeror does not need to use the company's cover page?**  
This is the City's cover page of the RFP. You can use your company's cover page if you wish, but you will need to include the City's RFP cover page with the section you have for forms that need to be signed.

259. **If Prime Contractor is not MWBE certified, can offeror use it's subcontractor's MWBE certificate?** Yes, if you are sub-contracting with an MWBE that is certified and you can provide documentation showing as such.



Signature

11/13/2024

Date

Kellton Tech Solutions Inc  
Company Name

**City of Charleston  
Procurement Division**  
75 Calhoun Street, Suite 3500  
Charleston, SC 29401



**ADDENDUM #3 Q&A**

T: (843) 724-7314  
F: (843) 720-3872

**DATE:** November 11, 2024

**TO:** All Bidders

**FROM:** Robin B. Robinson

**RE:** 24-P028R – Comprehensive Data Analytics System

This addendum #3 to the solicitation is being made for the following reasons:

The below is for clarification of answers provided for 2 questions.

**Referring to the response to Question 29:** CPD has clarified that security clearances required to support this from vendors is “Basic CJIS Vendor certification”. We assume if a vendor is not CJIS compliant, but the individuals onboarded/working on the project are CJIS compliant and certified, the vendor is still eligible to bid on this project and won’t be disqualified, correct?

**Response to above:**

Correct. The individuals doing the actual work that will be granted access to our systems can take a basic vendor security certification to meet this requirement. The entire business does not need to be certified.

**Referring to the response to Question 113 as outlined below. We believe the ask in this question was misunderstood so the answer provided is completely different from the subject. Hence, we request inputs to clarify our ask.**

*“Pertaining to the List of Qualifications and References Section of the RFP, we would like to clarify if the four similar project the offeror needs to share as References be completed entirely within the past three years, or would older and ongoing projects be acceptable? We would like to request the City to consider projects within the last 5 years as references. Kindly consider.”*

**Response to above:**

The City will accept references that have been active for at least the last 5 to 7 years.

If you have any questions, please feel free to call 843-724-7314. Thank you in advance for your cooperation.

  
Signature of Acknowledgement

11/13/2024

Date

KelltonTech Solutions Inc

Company Name

## **Submittal Checklist**

Responses shall be mailed/delivered in a sealed envelope to the City's Procurement Division no later than and time as shown in this solicitation.  
<https://www.charleston-sc.gov/Bids.aspx?CatID=17>

Did an authorized company representative sign:

- The front page of this solicitation?
- The Certificate of Familiarity?
- The bottom portion of this page?

Did an authorized company representative sign the Certificate of Familiarity?

Did you include references if required?

Did you provide a copy of your Certificate of Insurance, if required?

Did you check the City's website for any addenda and include a signed copy of each with your response?

Did you complete and include pricing sheets, if included?

Did you double check to make sure you have included everything requested in this solicitation?

Payment Terms: <b>NET 30</b>	Federal ID/SS: <b>47-4003633</b>	Unique Entity ID: <b>ESVGJ3RQDFG1</b>
A/R Point of Contact (Name, Phone & Email): <b>Madhu Babu , Phone :630.689.2960 Ext 1114</b>		
E-mail: <b>accounts.receivable@kelltontech.com</b>		
Company Legal Name & DBA: <b>N/A</b>		
Remit to Address: <b>5600 Tennyson Parkway, Suite # 245, Plano, TX 75024</b>		
Person Authorized to Sign:		Date: <b>11/04/2024</b>
Printed Name:	<b>Shankara Pesalperthy</b>	Phone: <b>732 820 9750 x 503</b>
Fax:	<b>877-800-9321</b>	Email Address: <b>shankar@kellton.com</b>

If you have any concerns, please do not wait until after opening to raise them. **At that point, it is too late. If this solicitation includes a pre-bid conference or a question & answer period, raise your questions during this time.** Please read the bid carefully.

**This checklist is included only as a reminder to help Bidders avoid common mistakes. Responsiveness will be evaluated against the solicitation, *not* against this checklist. You do not need to return this checklist with your response.**

## **EXHIBIT E**

# Comprehensive Data Analytics System

## RFP No : 24-P028R



Our mission is to be a trusted digital partner driving transformational outcomes for our customers, while empowering our employees to achieve their full potential - unlocking Infinite Possibilities with Technology.

**We leverage technology to digitally transform organizations.**

**Proposal Submitted by**  
Siddharth Chaudhry  
Director, Sales & Client Partner  
[siddharth.chaudhry@kellton.com](mailto:siddharth.chaudhry@kellton.com)

Version 1.0  
Dated: 14/Nov/2024



Dallas | Washington DC | New Jersey | Canada | London | Poland | Ireland | Singapore | Dubai | Hyderabad | Gurgaon | Pune

## Table of Contents

Engagement Cost.....	3
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## Engagement Cost

In this section, we cover the costs of executing this project. There are three cost components:

1. Solution Implementation Cost: This refers to the resource cost involved in building the solution.
2. Licensing Cost: This refers to the licensing costs of the technologies involved.
3. Training Cost:
4. Support costs: This refers to the costs associated with training CPD teams as well as providing on-going support & maintenance.

### Cost Summary

#	Pricing Breakdown	Price in USD
1	Software Licensing	\$19,440 annually ( <a href="#">Cost Breakdown in Appendix C</a> of proposal)
2	Implementation Services	\$279,009
3	Training	\$4,200 ( <a href="#">Training Model details in Appendix D</a> of proposal)
4	Support	\$98,400 annually ( <a href="#">Model Details/Breakdown in Appendix E</a> of proposal)

Table 6 : Engagement Cost Summary

### Total Cost of Ownership

Cost Breakup	Year 1	Year 2	Year 3	Year 4	Year 5
Software Licensing	\$19,440	\$19,440	\$19,440	\$19,440	\$19,440
Implementation Services	\$279,009	-	-	-	-
Training	\$4,200	-	-	-	-
Support	\$98,400	\$98,400	\$98,400	\$98,400	\$98,400
<b>Total</b>	<b>\$401,049</b>	<b>\$117,840</b>	<b>\$117,840</b>	<b>\$117,840</b>	<b>\$117,840</b>

Table 7 : Summary View of the total cost of ownership

## **EXHIBIT F**

# Comprehensive Data Analytics System

*Revised proposal for On-Prem Solution*

April 3rd, 2025

Submitted by:

Siddharth Chaudhry  
Director, Sales & Client Partner  
Kellton Tech Solutions Inc.  
siddharth.chaudhry@kellton.com

## Table of Contents

<b>Executive Summary</b>	<b>3</b>
<b>Proposed Solution - On Prem</b>	<b>4</b>
Hardware And Software Requirement	6
Key Assumptions	7
Key Dependencies	8
<b>Commercials</b>	<b>9</b>

## Executive Summary

Thank you for the opportunity to present Kellton's revised proposal for an on-premises data platform solution for the Charleston Police Department. As discussed in our previous meetings, we understand your preference for an on-premises deployment and have tailored our approach accordingly.

This proposal outlines a comprehensive data platform designed to meet the specific needs of law enforcement operations while maintaining the highest standards of security and compliance. Our solution architecture enables secure data integration from multiple sources, robust processing capabilities, and powerful visualization tools through Power BI Report Server—all within your controlled datacenter environment.

We've carefully revised our cost structure to clearly differentiate between Kellton's professional services and the hardware/software infrastructure requirements that will be provided by the Charleston Police Department. The following pages detail the technical specifications, implementation approach, cost breakdown, and assumptions underlying our proposal.

Our team is committed to delivering a solution that not only meets your current needs but also provides a foundation for future growth and evolution of your data analytics capabilities. The detailed hardware specifications, software requirements, security considerations, and commercial terms are provided in the following pages of this proposal.

## Proposed Solution - On Prem

This architecture diagram below outlines a data platform and analytics workflow, starting from data ingestion and integration to visualization and access control.

The platform will ingest data from multiple sources, including database sources like Microsoft Access & SQL Server, Web Applications APIs, flat files like CSV, Excel, and other structured files and external Data.

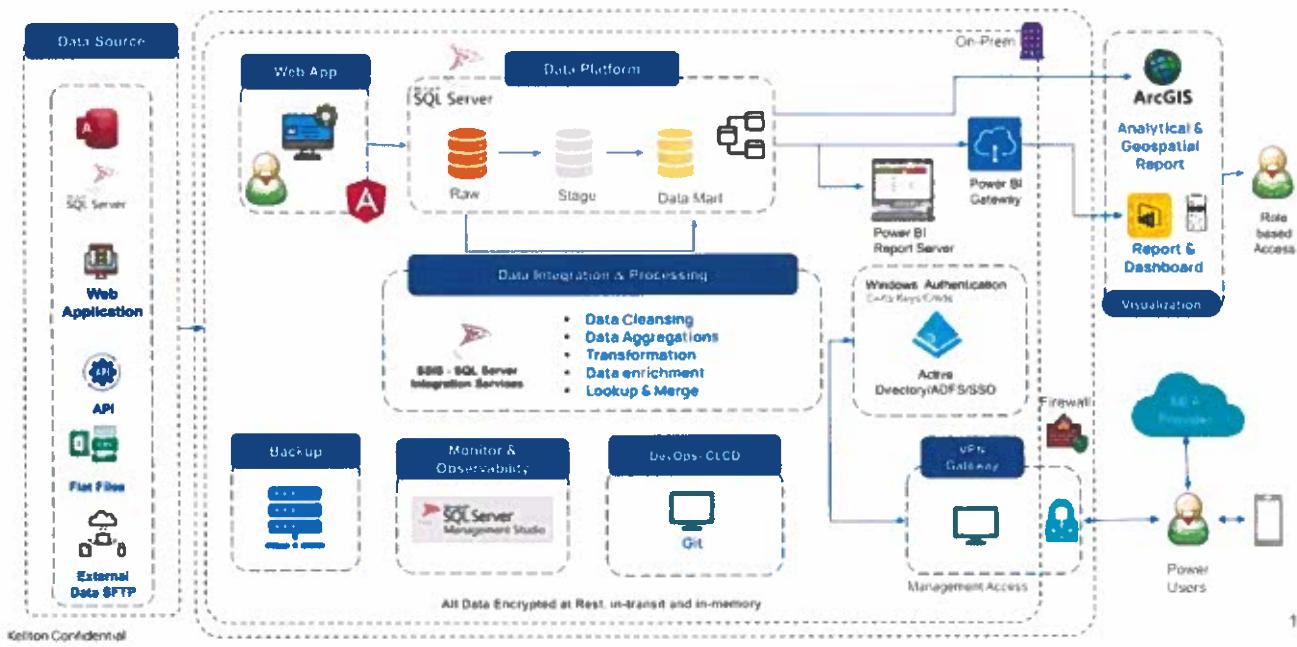
Web Application Layer will consist of a user interface that will enable manual data entry into SQL server databases. The web app is built using Angular or similar technology.

SQL Server database will host the data, which medallion architecture comprising logical stages of Raw for Initial data ingestion, Stage for Intermediate transformations and processing and finally Data Mart layer for high quality datasets for reporting and analysis.

Data integration and processing through the layers is done by SQL Server Integration Services (SSIS) for data cleansing, transformation & enrichment, lookup & merge and aggregation.

Data is visualized and reported using Power BI Report Server to ensure on-premises report generation. Additionally cloud based Power BI Service can be connected to on-prem SQL server databases. Users will have controlled access based on their roles, ensuring secure and appropriate data visibility. Hence we have the option of choosing between an on-prem Power BI Report Server OR Cloud based Power BI service.

To ensure data resilience and disaster recovery, backup is proposed by an SQL server instance, while database performance monitoring is handled through SQL Server Management Studio (SSMS). Version control and deployment processes are streamlined via Git, facilitating smooth updates for both code and databases. Security and authentication measures include Windows Authentication integrated with Active Directory (ADFS/SSO) for centralized identity management, along with a VPN gateway and firewall to enable secure remote access. Additionally, Multi-Factor Authentication (MFA) is implemented to enhance security for privileged users.



## Hardware And Software Requirement

The following specifications outline the recommended hardware and software components required to support the proposed data platform solution. These specifications have been carefully designed to ensure optimal performance, reliability, and scalability for the Charleston Police Department's operational needs.

	Description	Hardware Specification			Operating System	Additional Software
		CPU	RAM (GB)	Storage (TB)		
<b>Database Server (Production)</b>	Production server for SQL Server database	8	32	2	Windows Server 2022 Standard Edition	SQL Server 2022 Enterprise
<b>Database Server (Dev and QA)</b>	Dev and QA server for SQL Server database	4	32	2	Windows Server 2022 Standard Edition	SQL Server 2022 Developer Edition
<b>Web server (Production)</b>	For Manual Data Entry application	4	16	1	Windows Server 2022 Standard Edition	SQL Server 2022 Enterprise
<b>Web server (Dev and QA)</b>	For Manual Data Entry application	2	8	1	Windows Server 2022 Standard Edition	SQL Server 2022 Developer Edition
<b>Backup Server</b>	Backup Data storage	4	16	2	Windows Server 2022 Standard Edition	SQL Server 2022 Enterprise
<b>Power BI Report Server</b>	On-Prem Power BI reporting	8	32	2	Windows Server 2022 Standard Edition	Power BI Report Server
<b>Data Integration Server</b>	ETL and Data Movement	4	32	1	Windows Server 2022 Standard Edition	SQL Server Integration Service SQL Server management Studio

RDP Server	Remote Desktop connectivity	4	16	0.5	Windows Server 2022 Standard Edition	Windows RDP Client
DevOps and Observability	CI/CD	4	16	0.5	Windows Server 2022 Standard Edition	Git
Gateway Server	For VPN connectivity to CoC Data Center	2	8	0.5	Windows Server 2022 Standard Edition	VPN Server Software as per CoC guidelines
Firewall	Network Security	2	8	0.5	Windows Server 2022 Standard Edition	As per CoC guidelines

### **Virtualization Considerations**

- All servers specified above can be provisioned as virtual machines within the City of Charleston's existing virtualization infrastructure, provided the allocated resources meet or exceed the specifications listed.

### **Storage Requirements**

- Storage requirements reflect baseline needs for application and database files. We recommend implementing enterprise-grade storage solutions with appropriate RAID configurations to ensure data integrity and optimal performance. Additional storage may be required based on data growth projections and retention policies.

### **Licensing Implications**

- The software requirements outlined above will require appropriate licensing based on the City of Charleston's existing enterprise agreements. We recommend reviewing current licensing agreements to identify potential cost optimizations, particularly for SQL Server 2022 Enterprise and Windows Server 2022 deployments.

## **Key Assumptions**

Our proposal is built upon the following key assumptions to ensure alignment between Kellton's delivery approach and the Charleston Police Department's operational environment:

### **Infrastructure and Hosting**

- The solution will be deployed within the City of Charleston's (CoC) managed datacenter, leveraging existing infrastructure where possible.
- All hardware configurations can be virtualized according to CoC's virtualization standards and practices.
- The CoC IT team may consolidate software components onto shared servers to optimize resource utilization and reduce infrastructure footprint, provided performance requirements are maintained.

### **Reporting and Authentication**

- A dedicated Power BI Report Server will provide secure, on-premises reporting capabilities without requiring cloud connectivity. The architecture diagram shows how Power BI Service

- can connect to on-prem data source through gateway. We have the option of choosing between an on-prem Power BI Report Server OR Cloud based Power BI service.
- All authentication mechanisms (Multi-Factor Authentication, firewall rules, VPN access) will be provided by CoC in accordance with existing security policies and infrastructure.

### Environment Specifications

- Development and QA environments will be provisioned with reduced specifications compared to production, reflecting their lower performance demands while maintaining functional equivalence.
- The CoC may introduce additional technical requirements during implementation that extend beyond our proposed architecture; we will address these through our change management process.

### Monitoring and Observability

- Monitoring and Observability is proposed with SQL Server capabilities to keep it within Microsoft stack, however Prometheus, Grafana can be considered.

### Security and Compliance

- The CPD IT department will assume responsibility for manual platform configuration relating to security policies, with Kellton providing technical guidance and support throughout implementation.
- All backup and disaster recovery protocols will align with existing CoC policies to ensure data resilience and business continuity.
- Security measures, including data encryption and access controls, will adhere to CoC's regulatory requirements and law enforcement operational standards, with particular attention to CJIS compliance.

We believe these assumptions represent a practical foundation for successful implementation while allowing flexibility to adapt to the CPD's specific operational requirements.

### Key Dependencies

- Data Accessibility:** Timely access to data from CPD's systems (RMS, CAD, and external sources) is essential for data ingestion. Delays in data availability may impact project implementation timelines.
- Data Quality:** Source data should be accurate and complete to minimize data cleansing needs. Poor data quality could require additional work, potentially impacting timelines.
- IT Team Support:** Availability of CPD's IT team is needed to assist with data access, compliance, and infrastructure setup. Limited support could slow down initial setup and troubleshooting.
- Network and Security:** A strong, secure network is necessary for data transfers, especially for real-time data integration. Insufficient resources may lead to data transfer disruptions.
- CJIS Compliance and Governance:** Clear guidelines on CJIS compliance and data governance are necessary. Gaps in requirements may require additional adjustments, impacting project timelines.

- **Provisioning of Hardware and Software:** Quick provisioning of servers and relevant software is needed to initiate the project. Delays here could affect the setup phase.
- **Tool and License Availability:** Access to servers, database and Power BI / ArcGIS Online for data processing and reporting is essential. Any licensing or access issues could disrupt the data workflow.
- **Stakeholder Readiness for Training:** Staff engagement in training and adapting to new tools is crucial for successful system adoption.
- **Role-Based Access Setup:** Timely setup of role-based access ensures data security. Delays in permissions setup could impact secure data access.

## Commercials

Our proposed solution represents a comprehensive implementation and support strategy designed specifically for the Charleston Police Department's on-premises data platform requirements.

Cost Breakup	Year 1	Year 2	Year 3	Year 4	Year 5
<b>Implementation Services*</b>	\$310,331	-	-	-	-
<b>Training</b>	\$4,200	-	-	-	-
<b>Support</b>	\$27,315	\$36,420	\$36,420	\$36,420	\$36,420
<b>Total</b>	<b>\$341,846</b>	<b>\$36,420</b>	<b>\$36,420</b>	<b>\$36,420</b>	<b>\$36,420</b>
Total Cost of Ownership (5 years)					\$487,526

*\*we have included a 5% discount on the on-prem implementation cost, which originally was \$326,664*

### Important Notes Regarding Infrastructure Costs :

The investment figures above reflect Kellton's professional services only and do not include:

1. Hardware infrastructure (servers, storage, networking equipment)
2. Software licensing costs (SQL Server 2022, Windows Server 2022, Power BI Report Server)
3. Datacenter costs (power, cooling, rack space)
4. Backup infrastructure and media
5. Security infrastructure (firewall, VPN, MFA solutions)

These infrastructure components will be provided by the Charleston Police Department according to the technical specifications detailed in this proposal. We are available to assist with the proper sizing and configuration of these components to ensure optimal performance of the solution.

Our financial model assumes all licensing will be procured through the City of Charleston's enterprise agreements.



"Infinite possibilities with technology"

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

## **EXHIBIT G**

## Payment Structure

Our objective is to align invoicing with project milestones and deliverables, while also ensuring simplicity and predictability from a financial processing standpoint. With this view, we would like to propose the following structure, totalling **\$314,531**. This milestone-based structure ensures that each invoice is tied directly to tangible deliverables, providing transparency and auditability. We believe it also offers a straightforward schedule that will make it easier for your finance team to process.

Payment Milestones					
Invoice	% of Total	Amount (USD)	When (Timeline)	Milestones Covered	Key Deliverables
Invoice 1: Project Kickoff	30%	\$94,359	End of Week 3	Project Kickoff, Infrastructure Setup	Project Charter, Security Setup, Data Source Inventory
Invoice 2 – Infrastructure & Development	30%	\$94,359	End of Week 5	Requirement Gathering, Data Architecture & Infrastructure Setup, Data Modeling & Storage Design	Architecture Blueprint, Data Models, Schema Designs, Requirements Document
Invoice 3 – Build, QA & UAT	30%	\$94,359	End of Week 9	ETL Development, Dashboard Development, QA, UAT	ETL Workflows, Dashboards & Reports, QA Results, UAT Approvals
Invoice 4 – Go-Live & Closure	10%	\$31,453	End of Week 12	End-User Training, Deployment, Post-Deployment Support	Training Guides, User Manuals, Production Deployment, Support Log & Final Report
TOTAL		<b>\$314,531</b>			

\*This payment structure does not include Support costs beyond one week of 'Post-Deployment Support and Optimization'

## Assumptions/ Dependencies

The payment structure is subject to the following assumptions and dependencies:

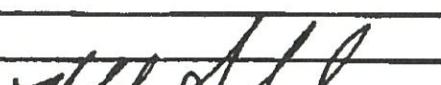
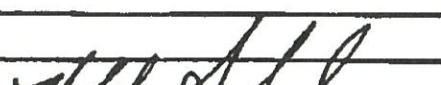
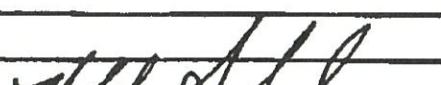
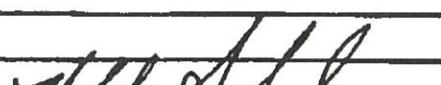
Assumption/ Dependency	Description
Stakeholder Availability	Client stakeholders will be available for requirement workshops, UAT sessions, and trainings as per the agreed timeline.
Timely Approvals	Client will provide feedback, sign-offs, and approvals (requirements, architecture, UAT, etc.) within 3 business days of submission; delays will proportionally extend the timeline.
Data Access	Client will provide timely and secure access to all

	required systems, databases, and source files for data integration and testing.
Environment Readiness	Client will provision/approve infrastructure resources (cloud/on-prem) as per the agreed schedule.
Scope Stability	Scope is as defined in the requirements; significant changes (e.g., new data sources, additional reports, security constraints) may require a change order.

## COMMITTEE / COUNCIL AGENDA

<b>TO:</b>	<b>William S. Cogswell, Jr., Mayor</b>		
<b>FROM:</b>	<b>Robert Somerville</b>	<b>SECTION</b>	<b>Public Works</b>
<b>SUBJECT:</b>	<b>1770 T4 BOBCAT COMPACT TRACK LOADERS &amp; KAUFMAN EQUIPMENT TRAILER</b>		
<b>REQUEST:</b>	<b>Approval to purchase 2 each T770 T4 Bobcat Compact Track Loaders and Kaufman Tilt Deck Wood Deck 22' Equipment Trailer from InfraServ US, LLC DBA Bobcat of Charleston. Sourcewell Contract #020223-CEC</b>		
<b>COMMITTEE OF COUNCIL:</b>	<b>Ways &amp; Means</b>	<b>DATE:</b>	<b>January 13, 2026</b>

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	<u>Signature of Individual Contacted</u>	<u>Attachment</u>
Corporate Counsel	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Section Chief	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Procurement Director	<input checked="" type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: 310000 Account #: 58010

Balance in Account \_\_\_\_\_ Amount needed for this item \$194,950.00 

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

**CFO's Signature:** Matthew Dyer CFO for Amy Whaley, CP

**FISCAL IMPACT:** This will be using 2026 Lease Purchase Funds.

**Mayor's Signature:** \_\_\_\_\_ **William S. Cogswell, Jr., Mayor**

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.



Quotation Number: JE1524658  
Quote Sent Date: Dec 22, 2025  
Expiration Date: Jan 22, 2025  
Prepared By: Joe Ellis  
Phone: +18434250291  
Email: jellis@bobcatofcharleston.com

Customer  
**City of Charleston Fleet**  
2150 MILFORD ST  
CHARLESTON, SC, 29405-9418  
Phone: +1 843 724 7368

Contact  
**Matt Alltop**  
Email: alltopm@charleston.sc.gov

Dealer  
**Bobcat of Charleston, North Charleston, SC**  
7152 CROSS COUNTY RD  
NORTH CHARLESTON, SC, 29418

Item Name	Item Number	Quantity	Price Each	Total
<b>T770 T4 Bobcat Compact Track Loader</b>	M0285	2	65,090.00	130,180.00

**Standard Equipment:**

92 HP Turbo Tier 4 Diesel Engine  
Air Intake Heater (Automatically Activated)  
Auxiliary Hydraulics: Variable Flow  
Backup Alarm  
Bob-Tach  
Bobcat Interlock Control System (BICS)  
Controls: Hand and Foot (Manual)  
Cylinder Cushioning - Lift, Tilt  
Engine/Hydraulic Systems Shutdown  
Glow Plugs (Automatically Activated)

Horn  
Instrumentation: Engine Temp and Fuel Gauges, Hourmeter, RPM and Warning Indicators  
Lift Arm Support  
Lift Path: Vertical  
Lights, Front & Rear  
Operator Cab  
Includes: Adjustable Suspension Seat, Top & Rear Windows, Seat Bar, Seat Belt  
Roll Over Protective Structure (ROPS) meets SAE-J1040 & ISO 3471  
Falling Object Protective Structure (FOPS) meets SAE-J1043 & ISO 3449, Level I; (Level II is available through Bobcat Parts)  
Parking Brake: Spring Applied, Pressure Released (SAPR)  
Solid Mounted Carriage with 5 Rollers  
Tracks: Rubber, 17.7" Wide C-Pattern  
Warranty: 2 years, or 2000 hours whichever occurs first

<b>Comfort Package</b>	M0285-P11-C07	2	5,900.00	11,800.00
------------------------	---------------	---	----------	-----------

*Included:* Comfort Package Includes: Enclosed HVAC Cab, Adjustable Vinyl Suspension Seat, Power Bob-Tach, Keyless Ignition, Deluxe Display, Standard Lights, 7-Pin Attachment Control, Single Direction Bucket Positioning, Two-Speed Travel, Telematics - Machine IQ - 2yr Standard Telematics Subscription,

<b>Selectable Joystick Controls (SJC)</b>	M0285-R01-C04	2	500.00	1,000.00
<b>High Flow Hydraulics</b>	M0285-R03-C03	2	1,600.00	3,200.00
<b>Grader, 96"</b>	7160005	2	12,500.00	25,000.00
<b>Box Blade End-wing Kit</b>	7177684	2	480.00	960.00
<b>Kit Mount Receiver Trimble LR410</b>	7436129	2	1,050.00	2,100.00
<b>Laser Receiver, Trimble LR410</b>	7436330	4	1,500.00	6,000.00
<b>Laser Transmitter - Topcon</b>	7531738	2	2,400.00	4,800.00
<b>Tripod - Topcon</b>	7531739	2	480.00	960.00
<b>Total for T770 T4 Bobcat Compact Track Loader</b>				186,000.00

**Kaufman Tilt Deck Wood Deck 22' 1  
Equipment Trailer**

**Description:** W/Spare Tire

Total for Kaufman Tilt Deck Wood Deck 22' Equipment Trailer	7,450.00
Quote Subtotal	193,450.00
Sales Total before Taxes	193,450.00
Taxes	1,500.00
<b>Quote Total - USD</b>	<b>194,950.00</b>

**Comment:** \*Plus applicable taxes. IF Tax Exempt, please include Tax Exempt Certificate with the order.

\*Prices per the Sourcewell Contract #020223-CEC

\*Sourcewell Member Number (if applicable): \_\_\_\_\_

\*All orders should include 1) Accounts Payable Contact and email address, 2) W9 with correct legal entity name, and 3) Bill to Address.

\*Orders may be placed with the contract holder or authorized dealer as allowed by the terms and conditions of the contract.

\*Contact Holder Information: Doosan Bobcat North America, Inc. Govt Sales, 250 E Beaton Drive, West Fargo, ND 58078. TID# 38-0425350.

\*Payment Terms: Net 60 Days. Credit cards accepted.

**Customer Acceptance:**

Quotation Number: JE1524658

Purchase Order: \_\_\_\_\_

**Authorized Signature:**

Print: \_\_\_\_\_ Sign: \_\_\_\_\_

Date: \_\_\_\_\_ Email: \_\_\_\_\_ Tax Exempt: Y  / N

3d)

## COMMITTEE / COUNCIL AGENDA

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Robert Somerville	SECTION	Public Works
SUBJECT:	2027 MD7 33K GVW CHASSIS W/18' CRYSTEEL SCOW BODY		
REQUEST:	Approval to purchase 2 each 2027 MD7 33K GVW Chassis w/18' Cryssteel Scow Body from Hughes Motors, Inc., North Charleston, SC Sourcewell Contract #032824-MAK		
COMMITTEE OF COUNCIL:	Ways & Means	DATE:	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	<u>Signature of Individual Contacted</u>	<u>Attachment</u>
Corporate Counsel	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Section Chief	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Waltell</i>	<input type="checkbox"/>
Procurement Director	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<i>Greg C</i>	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: 321200 Account #: 58010 *ANW*  
Balance in Account \_\_\_\_\_ Amount needed for this item \$271,538.00

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

**CFO's Signature:** Matt L. Deputy CFO for Amy Whelan, CFO

**FISCAL IMPACT:** This will be purchase using 2026 Lease Purchase Funds.

**Mayor's Signature:** \_\_\_\_\_ **William S. Cogswell, Jr., Mayor**

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.

# CUSTOMER PROPOSAL



2027 MD7 33K GVW CHASSIS

w/ 18' CRYSTEEL SCOW BODY

UPGRADED SPEC

**PREPARED FOR**

CHARLESTON

2150 MILFORD ST

CHARLESTON

SC 294059418

**DATE**

11/26/2025

**PREPARED BY**

HUGHES MOTORS, INC.

6841 BULLDOG DRIVE

NORTH CHARLESTON

SOUTH CAROLINA 29406

**QUOTE INFORMATION**

BUNC2025000211C631

MD7 42R

Qty: 2





Mr. Matt Alltop,

Thank you for giving us this opportunity to provide a quote.

**PREPARED FOR**  
CHARLESTON  
2150 MILFORD ST  
CHARLESTON  
SC 294059418

**DATE**

11/26/2025

**PREPARED BY**

HUGHES MOTORS, INC.  
6841 BULLDOG DRIVE  
NORTH CHARLESTON  
SOUTH CAROLINA 29406

**QUOTE INFORMATION**

BUNC2025000211C631

MD7 42R

Qty: 2

This proposal contains the complete specification and performance details of the Mack truck configured for your application. Every proposed spec from Mack is prepared with the highest return on investment as the key objective for our customers, reflecting Mack's focus on application excellence to deliver maximum uptime, fuel economy, reduced maintenance, driver satisfaction and productivity, and high resale value. The enclosed spec has been carefully designed to meet all these objectives.

Beyond the technical specifications contained in this proposal, it's important to remember that each Mack truck is backed by Mack Connect, the industry's leading uptime and productivity solution, plus a coast-to-coast network of Mack dealer service locations.

2025 marks 125 years of contributing to our customer's legacy of success. By becoming a Mack owner, you become part of a proud heritage established by a community of people driven to be the very best. You can depend on Mack to help power your drive to succeed!

I look forward to meeting with you to discuss any questions you might have regarding this proposal.

Yours sincerely,

*William Peek*

**BILL PEEK**

HUGHES MOTORS, INC.

**PRICELIST DATE**  
20250818

**QUOTATION**  
BUNC2025000211C631

**DATE**  
11/26/2025

**PAGE**  
2 of 9

# TECHNICAL SPECIFICATION

## MD7 42R



CUSTOMER/VEHICLE INFO		DESCRIPTION
S	CHASSIS (BASE MODEL)	MD742 - GEN2 - 42R MEDIUM DUTY, CLASS 7 w/ 6.7L, (MAX 33,000lbs GVWR) 107" BBC
	VEHICLE USE & BODY/TRAILER TYPE	DUMP TRUCK
	VEHICLE VOCATION	CONSTRUCTION SERVICE
S	CUSTOMER FLEET SIZE	DEALER FLEET WITH LESS THAN 25 VEHICLES IN OWN FLEET OF ANY VEHICLE BRAND
	TYPE OF SERVICE	MUNICIPAL
	Order Subject to Meeting All Mack Policies, Terms and Conditions,	Including but not Limited to Applicable CARB and/or Section 177 States' Regulation requirements
	INTENDED REGISTRATION LOCATION	SOUTH CAROLINA
S	WARRANTY REGISTRATION LOCATION	USA - WARRANTY REGISTRATION LOCATION
	EMISSION WARRANTY CERTIFICATION	EPA (only) Cummins Diesel 6.7L
S	INITIAL REGISTRATION LOCATION	USA REGISTRATION
S	LANGUAGE-PUBS/DECAL/SIGNS	ENGLISH
S	OPERATING TERRAIN GRADE CONDITIONS	CITY, STARTING GRADES<6%
S	LOADING SURFACE FACTOR	ASPHALT LOADING AND / OR UNLOADING SURFACE
	PEDAL RSL SETTING	113 KM/H PEDAL ROAD SPEED LIMITER (70MPH)
	CRUISE CONTROL, MAX SPEED	MAX CRUISE, 113 KPH (70 MPH)
	ROAD SPEED LIMITER SETTING	113 KM/H ROAD SPEED LIMITER (70MPH)
S	OPERATING CLASS	OPERATING CLASS 7; 33000lb GVWR
	SALES PROMOTION	SOURCEWELL SALES PROGRAM

ENGINE & TRANSMISSION		DESCRIPTION
S	EMISSION ON BOARD DIAG CONTROL	EMISSION OBD, DISPLAY ONLY, USA2016
	ENGINE / MOTOR	ISB6.7-300 DIESEL CUMMINS 300HP @ 2600RPM (GOV) 660 LB-FT, US21
	TRANSMISSION	2500 RDS 6 SP-ALLISON RUGGED DUTY SERIES GEN 6 (WITH PTO PROVISIONS)
S	FUELSENSE CALIBRATION	ALLISON FUELSENSE, NEUTRAL AT STOP
S	TRANSM AUTO NEUTRAL ON P-BRAKE	AUTO NEUTRAL SINGLE INPUT WITH SHIFT SELECTOR OVERRIDE

ENGINE & TRANSMISSION EQUIPMENT		DESCRIPTION
	ENGINE BRAKE TYPE	VGT TURBO EXHAUST BRAKE (DIESEL ONLY)
	CRUISE CONTROL	CRUISE CONTROL
S	ALTERNATOR	DELCO 12V 160A (28SI) BRUSH-TYPE
	BATTERY DISCONNECT SWITCH	BATTERY DISCONNECT SWITCH
S	STARTER MOTOR	12 VOLT MELCO STARTER (MITSUBISHI ELECTRIC)
S	ENGINE BLOCK HEATER	120 VOLT / 0.75 KW, ENGINE BLOCK HEATER
	POWER TAKE OFF CONTROL	POWER TAKE OFF TRANSMISSION CONTROL, PREP KIT F/SINGLE PTO

AXLE & SUSPENSION		DESCRIPTION
S	FRONT AXLE	12,000LB MERITOR MFS+ 5400 KG
S	SPRINGS - FRONT	MACK TAPERLEAF 12300# (5500 KG) GROUND LOAD RATING
S	FRONT AXLE BRAKES	MERITOR "S" CAM TYPE 16.5" x 5" Q+
S	PARKING BRAKE VALVE	PARKING BRAKE VALVE, 1 YELLOW KNOB, ALL PARKING
S	ANTILOCK BRAKE SYSTEM	BENDIX WITH TRACTION CONTROL 4S4M
	REAR AXLE - SINGLE	21000# (9525 kg) MERITOR MS-21-14X, (W/ DIFF LOCK) CASING 11.0mm

# TECHNICAL SPECIFICATION (cont.)



AXLE & SUSPENSION		DESCRIPTION
S	REAR SUSPENSION - SINGLE	21000# (9525kg) MULTILEAF
	SUSPENSION LEVELLING DEVICE (CA in PC29 only)	WITHOUT SUSPENSION LEVELLING DEVICE
S	BRAKES - REAR	MERITOR "S" CAM 16.5"x7" Q+
S	REAR AXLE RATIO	RATIO 5.57, REAR AXLE
CHASSIS EQUIPMENT		DESCRIPTION
	DPF DIESEL PARTICULATE FILTER	CUMMINS SINGLE MODULE E.A.T.S. RH SIDE UNDER CAB US17 (7L over 271HP only!!)
S	EXHAUST	UNDERFRAME RIGHT SIDE INBOARD MOUNTED (Diesel engines only)
S	BODY BUILDER MODULE	EL PREP KIT, TMC RP1404 EL. INTERFACE NO BODYBUILDER MODULE
FRAME EQUIPMENT & FUEL TANKS		DESCRIPTION
	WHEELBASE	217" Wheelbase (150" CA) 85" After-frame
S	FRAME RAILS	STEEL - 260MM X 70MM X 8MM -- (10.24" X 2.75" X 0.31" ); RBM 1,580,000 LB-IN
S	PRIMARY FUEL FILTER	FUEL FILTER & WATER SEPARATOR (Diesel engines only)
	FUEL TANK - LH	90 GALLON (340 L) 22" ALUMINUM ROUND
CAB INTERIOR		DESCRIPTION
S	KEY TYPES FOR DOORS	BASIC UNIQUE KEY
S	SPEEDOMETER -&- GAUGES - UNIT(s) OF MEASURE	U.S. UNITS (PREDOMINANT)
S	LANE SUPPORT SYSTEM (LSS)	WITHOUT LANE CHANGE SUPPORT (requires 5480000)
S	PARK BRAKE ALARM	PARK BRAKE ALARM, SOUNDS IF BRAKE OFF & DRIVER'S DOOR OPENED
	BACK-UP ALARM	BACK-UP ALARM
S	AIR RESTRICTION INDICATOR	MECHANICAL, GRADUATED, ON FILTER
S	DAYTIME RUNNING LIGHTS	DRL WHEN ENGINE RUNNING & PARK BRAKE OFF
	FIRE EXTINGUISHER	HAND FIRE EXTINGUISHER 2.2 KG (5LB) ENGLISH DECAL, ABC
	WARNING TRIANGLE	THREE WARNING TRIANGLES
S	AUDIO SYSTEM	RADIO, AM/FM, MP3, WEATHER BAND, W/ MUTE IN REVERSE
S	AUDIO INTEGRAT. PHONE HANDSFRE	AUDIO INTEGRATED HANDSFREE PHONE, BLUETOOTH
S	AUDIO COMMUNICATION CONNECTOR	AUDIO COMMUNICATION CONNECTOR, USB AUDIO
S	AUDIO SHUTOFF	AUTOMATIC AUDIO SHUTOFF, REVERSE ENGAGED
S	COMMUNICATION EQUIPMENT	FACTORY INSTALLED GEOTAB FLEET MANAGEMENT SYSTEM
S	INTERIOR TRIM	PREMIUM SATIN FINISH INTERIOR TRIM, WITH OVERHEAD STORAGE CONSOLE
	SEAT - DRIVER'S	MACK-AIR, MORDURA HIGH BACK, 1 CHAMBER AIR LUMBAR
	DRIVER SEAT	MACK DRIVERS SEAT, AIR SUSPENDED
	DRIVERS SEAT UPHOLSTERY	DRIVERS SEAT UPHOLSTERY, MORDURA
	SEAT - PASSENGER'S	MACK-FIXED, MORDURA HIGH BACK
	PASSENGER SEAT	FIXED PASSENGER SEAT
	PASSENGERS SEAT UPHOLSTERY	PASSENGERS SEAT UPHOLSTERY, MORDURA
	SEAT BELT(S)	ALL SEAT BELTS - ADJUSTABLE D-RING, ORANGE
S	STEERING WHEEL ADJUSTMENT	TIPT / TELESCOPIC STEERING COLUMN
S	STEERING WHEEL SWITCHES	FLAT BOTTOM STEERING WHEEL, WITH BUTTON CONTROLS
S	BODY BUILDER INTERFACE	BODY BUILDER CONNECTIONS (on/in vehicle) Diesel Vehicles

# TECHNICAL SPECIFICATION (cont.)



CAB EXTERIOR		DESCRIPTION
S	CAB SUSPENSION TYPE	CAB SUSPENSION TYPE, AIR
S	HEADLAMPS	HEADLAMP TYPE, HALOGEN
	HOOD RADIATOR GRILLE, FINISH	HOOD RADIATOR GRILLE FINISH, BRIGHT CHROME
	FRONT BUMPER FINISH	STEEL FRONT BUMPER, BRIGHT FINISH
S	DOOR / WINDOW FEATURES	ELECTRIC WINDOWS AND DOOR LOCKS
S	DOOR WINDOW FRONT	PEEP WINDOW ON PASSENGER SIDE DOOR
	MIRRORS - EXTERIOR	HEATED AND MOTORIZED MIRRORS BOTH SIDES, BLACK (Anthem mirror)
S	GRAB HANDLES	EXTERIOR GRAB & DOOR HANDLES

WHEELS & TIRES		DESCRIPTION
	TIRES BRAND/TYPE - FRONT	11R22.5 G BRIDGESTONE R268 ECOPIA (12350 lbs) (Total for QTY = 2)
	WHEELS - FRONT	22.5x8.25 ACCURIDE, 43644x POLISHED ALUMINUM DISC (Total for QTY = 2)
	FRONT AXLE TIRE & WHEEL QUANTITY	TWO FRONT TIRES & WHEELS
	TIRES BRAND/TYPE - REAR	11R22.5 G BRIDGESTONE M760 ECOPIA (23360 lbs) (DRIVE ONLY) (Total for QTY = 4)
	WHEELS - REAR	22.5x8.25 ACCURIDE, 43644x POLISHED ALUMINUM DISC (Total for QTY = 4)
	REAR AXLE TIRE & WHEEL QUANTITY	FOUR REAR AXLE TIRES & WHEELS

PAINT		DESCRIPTION
S	PAINT TYPE	SOLID PAINT
S	PAINT COLOR - FIRST COLOR	GLACIER WHITE; P3029

BASE WARRANTY & PURCHASED COVERAGES		DESCRIPTION
S	ENGINE TOWING WARRANTY	CUMMINS ENGINES (Contact Cummins for Standard Warranty and Extended Coverage Details)
S	VEHICLE WARRANTY TYPE	NORMAL DUTY WARRANTY CLASSIFICATION
S	BASIC CHASSIS COVERAGE	CHASSIS PLAN 24 MO/UNLIMITED MI NORMAL DUTY PROTECTION PLAN
S	ENGINE WARRANTY	CUMMINS ENGINES B6.7 (Contact Cummins for Standard Warranty and Extended Coverage Details)
S	EMISSION COMPONENT COVERAGE	CUMMINS ENGINES (Contact Cummins for Standard Warranty and Extended Coverage Details)
S	TRANSMISSION WARRANTY	ALLISON TRANSMISSIONS (Contact Allison Transmission for standard warranty and extended coverage data)
S	AIR CONDITIONING WARRANTY	AIR CONDITIONING STANDARD COVERAGE (Sealed System Only) 24 MONTHS UNLIMITED MILEAGE
S	CHASSIS TOWING WARRANTY	STANDARD CHASSIS TOWING 90 DAYS OR 5,000 MILES

SERVICES		DESCRIPTION
S	MACK ONECALL AND ASIST	MACK ONECALL AND ASIST - 12 MONTH
S	PARTNERED SERVICES	GEOTAB FOR MACK TRUCKS - 6 MONTH

# PRICING SUMMARY

## MD7 42R

<b>Deal Size (Units)</b>	<b>2</b>	Sourcewell Sales Price	\$ 134,769.00
		S.C. IMF	\$ Not Included
		Total Sales Price	\$ 134,769.00
		Total Sales Price for 2) Units	\$ 269,538.00

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CHARLESTON DATE

*William Peck* 11/26/2025

HUGHES MOTORS, INC. DATE

Price includes an 18' steel Crysteel Scow body per the included specifications from W&W Body Builders

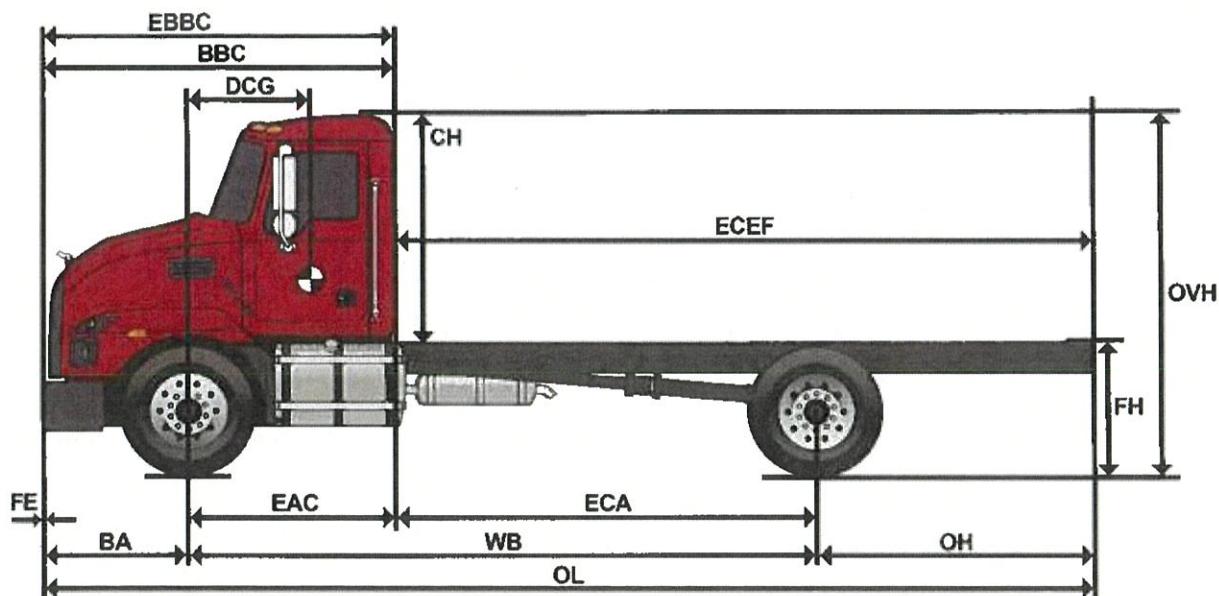
This is an upgraded chassis spec that includes a chrome grille, chrome front bumper, 21k rear axle w/ Diff lock,

Modura covered seats, power and heated mirrors, 90 gal alum fuel tank and all polished aluminum wheels.

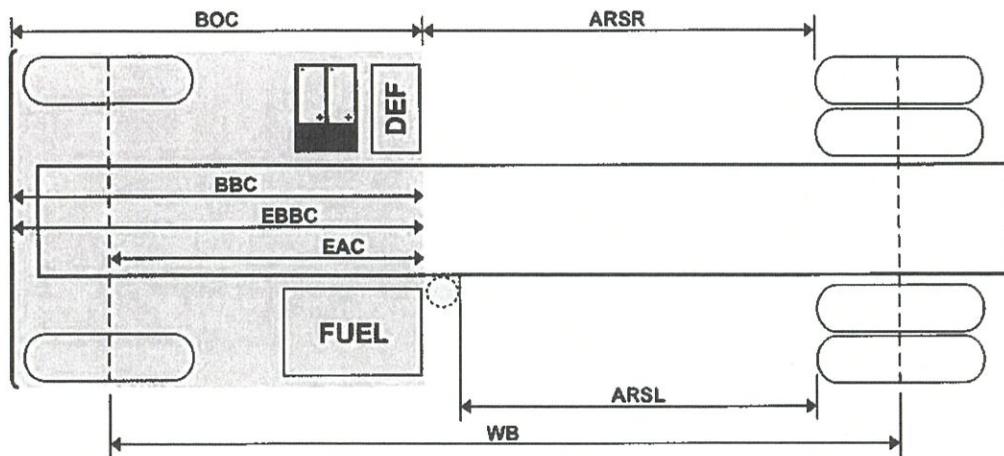
These trucks can be built mid to late January with delivery to you of the completed truck approximatalley mid to late February

**VEHICLE SPECIFICATION/CALCULATED PERFORMANCE SUMMARY**

Description	Dwg Ref	Length	UOM
Front Frame Extension	FE	0.0	INCHES
Bumper to Front Axle	BA	40.0	INCHES
Eff. Bumper to Front Axle	N/A	40.0	INCHES
Wheelbase	WB	216.9	INCHES
Rear Overhang	OH	85.0	INCHES
Overall Length	OL	342.0	INCHES
Bumper to Back of Cab	BBC	107.0	INCHES
Eff. Bumper to Back of Cab	EBBC	107.0	INCHES
Eff. Cab to Rear Axle	ECA	149.9	INCHES
Eff. Front Axle to Back of Cab	EAC	67.0	INCHES
Eff. Cab to End of Frame	ECEF	235.0	INCHES
Unladen Frame Height	FH	40.9	INCHES
Cab Height	CH	69.1	INCHES
Overall Height	OVH	110.0	INCHES
Driver CG	DCG	59.1	INCHES



VEHICLE SPECIFICATION/CALCULATED PERFORMANCE SUMMARY				
Description	Sales Code	Dwg Ref	Left Value(in)	Right Value(in)
Wheelbase	N/A	WB	216.9	216.9
Available Rail Space Right	N/A	ARSR	N/A	134.8
Available Rail Space Left	N/A	ARSL	98.6	N/A
Eff. Front Axle to Back of Cab	N/A	REF	67.0	67.0
Front Axle To Fender	001AA3	N/A	30.0	30.0
Battery Box	001AA3	N/A	0.0	25.0
90 GALLON (340 L) 22" ALUMINUM ROUND / TRUCK	2880N8 / 001AA3	N/A	67.2	0.0
Ad-Blue Tank	001AA3	N/A	0.0	6.0
Drive Tire Radius	901090	N/A	21.1	21.1



*Top View image is intended for illustration purposes only and is not presented to scale. Wheelbase, Axle Spacing and After frame are not shown as specified, but are a representation. Customer Adaptation (CA) options and relocated components are not represented in these images. Most CA options impact the variation of the image, thus an image may not populate. Calculations are approximate to a tolerance of  $\pm 4$  inches due to component mounting variation. Certain chassis component options are NOT represented in the Top View image, such as, but not exclusive to, Front Frame Extensions, Fuel Water Separators, Air Dryers, PTOs, Fifth Wheels, Chassis Fairings, Toolboxes, Trailer Connections. For further information on these items and their respective locations on your specification, please refer to the data sheets associated with those items in the configurator.*


**VEHICLE SPECIFICATION/CALCULATED PERFORMANCE SUMMARY**

Sub-Category	Sales Code	Sales Code Description	Value	UOM
Front Axle	2400S0	12,000LB MERITOR MFS+ 5400 KG	12000	LB
Front Suspension	2440C4	MACK TAPERLEAF 12300# (5500 KG) GROUND LOAD RATING	12000	LB
Front Tires	900AS0	11R22.5 G BRIDGESTONE R268 ECOPIA (12350 lbs)	12351	LB
Front Wheels	5310Z1	22.5x8.25 ACCURIDE, 43644x POLISHED ALUMINUM DISC	14801	LB
		Front GAWR	12000	LB
Rear Axle	2520O2	21000# (9525 kg) MERITOR MS-21-14X, (W/ DIFF LOCK) CASING 11.0mm	21000	LB
Rear Suspension	260AA5	21000# (9525kg) MULTILEAF	21000	LB
Rear Tires	901090	11R22.5 G BRIDGESTONE M760 ECOPIA (23360 lbs) (DRIVE ONLY)	23369	LB
Rear Wheels	346186	22.5x8.25 ACCURIDE, 43644x POLISHED ALUMINUM DISC	29601	LB
		Rear GAWR	21000	LB
		Truck GVWR	33000	LB
		Gross Combination Weight Rating	0	LB
		Tax Value GVWR (USA FET Only)	33000	LB

# MACK®



Mack Trucks  
[www.macktrucks.com](http://www.macktrucks.com)

## 4.)

## COMMITTEE / COUNCIL AGENDA

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Amy Wharton	DEPARTMENT	BFRC
SUBJECT:	WORKDAY SUCCESS PLAN SUBSCRIPTION		
REQUEST:	<p>Approval of a 8-year subscription fee for the Workday Success Plan and the implementation of Accounting Center which will optimize the usage of Workday and enhance efficiencies.</p>		
COMMITTEE OF COUNCIL:	Ways and Means	DATE:	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	<u>Signature of Individual Contacted</u>	<u>Attachment</u>
Corporate Counsel	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
Choose an item.	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	_____	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: BFRC Admin Account #: \_\_\_\_\_

Balance in Account \_\_\_\_\_ Amount needed for this item **\$2,514,147**

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

CFO's Signature: Amy Wharton

**FISCAL IMPACT:** *Amount represented above is the total cost over the 8-year period. Amount of subscription is \$284,000 in 2026 and \$318,595 for the remaining 7 years.*

Mayor's Signature: \_\_\_\_\_  
William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.

## ORDER FORM #00530622.0

<b>Customer Name</b>	City of Charleston
<b>Workday Entity Name</b>	Workday, Inc. Address: <a href="http://www.workday.com/contracting-entity-addresses">http://www.workday.com/contracting-entity-addresses</a>
<b>MSA Effective Date</b>	April 27, 2023
<b>Order Form Effective Date</b>	The later of the dates of the parties' signatures below
<b>Order Term</b>	January 21, 2026 through December 31, 2033
<b>Currency</b>	USD
<b>Underlying Order Form(s)</b>	391420, and if applicable, any related renewal Order Form(s) then in effect.
<b>WSP Fees before LOD/AK Credit</b>	815,113
<b>Credit Amount for Unearned LOD/AK fees from OF 00465039.0,00391219.0 ("Prior LOD/AK Order Form #")</b>	(6,914)
<b>Total WSP Fees</b>	808,199
<b>Total Subscription Fee</b>	2,514,147

## Payment Schedule Table

Payment #	Payment Due Date	Payment Amount
1	Due in accordance with the MSA, invoiced upon Order Form Effective Date	284,000
2	Due on First anniversary of the Order Term start date	318,592
3	Due on Second anniversary of the Order Term start date	318,592
4	Due on Third anniversary of the Order Term start date	318,592
5	Due on Fourth anniversary of the Order Term start date	318,592
6	Due on Fifth anniversary of the Order Term start date	318,592
7	Due on Sixth anniversary of the Order Term start date	318,592
8	Due on Seventh anniversary of the Order Term start date	318,595
<b>Total Payment Amount</b>		<b>2,514,147</b>

For the avoidance of doubt, the Payment Schedule Table will be used for invoicing purposes.

## Subscription Fees Table

Subscription Period	Date Range	Subscription Fee
1	January 21, 2026 through January 20, 2027	295,049
2	January 21, 2027 through January 20, 2028	300,949
3	January 21, 2028 through January 20, 2029	306,968
4	January 21, 2029 through January 20, 2030	313,108
5	January 21, 2030 through January 20, 2031	319,371
6	January 21, 2031 through January 20, 2032	325,757
7	January 21, 2032 through January 20, 2033	332,273
8	January 21, 2033 through December 31, 2033	320,672
<b>Total Subscription Fee</b>		<b>2,514,147</b>

The Subscription Fees Table provides the Subscription Fees for each applicable Subscription Period. The Subscription Fee for Subscription Period 2 onwards includes a capped Innovation Index of 2.0% (as defined in the Underlying Order Form(s)). During the initial Term, any increases due to CPI (also defined in the Underlying Order Form(s)) are waived.

## Subscription Rights Table

SKU	Service	Pricing Metric	Annual Subscription Rights
ACC	Accounting Center	Accounting Source Input Rows	Up to 25 Accounting Source Input Rows (in millions) and Up to 15 Months of Reporting History
XTND	Extend Professional	Application	Up to 10 Applications
WSP	Workday Success Plan	% of Fee	WSP - Accelerate

## 1. Additional Metric Definition(s).

### Additional Metric Definition Table.

Metric	Definition
ACC	<p>Accounting Source Input Row</p> <p>An input row selected for an Accounting Source used to generate accounting journals lines that are successfully recorded to the general ledger; an Accounting Source is a Workday configurable object that defines the steps, sources and rules of processing input rows in Accounting Center.</p> <p>Additional Accounting Center Definitions: Reporting History is the largest number of prior months that any Accounting Center Dataset is made available for reporting; an Accounting Center Dataset is any dataset that stores detailed accounting processing results produced by Accounting Center outside of ingestion and enrichment processing stages</p>
XTND	<p>Application</p> <p>An Extend App that has been promoted by a Developer to production. Each Extend App that has been promoted by a Developer to production is counted against Customer's Extend Subscription Right unless the Extend App is retired.</p>

## 2. Workday Success Plans Additional Terms.

Workday Success Plans is described in and subject to the Workday Success Plans Program Terms site (<https://www.workday.com/content/dam/web/en-us/documents/legal/workday-success-plans-accelerate-accelerateplus-plans-program-terms.pdf>) and subject to the terms of the Workday Customer Experience Program Addendum (<https://www.workday.com/en-us/legal/contract-terms-and-conditions/index/exhibits.html>). In the event of a conflict between the terms of this Order Form and the terms of either of the Workday Success Plans Program Terms or the Workday Customer Experience Program Addendum, the terms of this Order Form shall control. The Pricing Metric in the table above for Workday Success Plans is based on the annual Subscription Fees during the Order Term. If Customer purchases additional SKU(s) or Subscription Rights during the Order Term, an additional fee equal to 12.0% of the Subscription Fees of the new SKU(s) will be added for the Workday Success Plan to the new Order Form. The total Workday Success Plan fees assessed in this Order Form, in the amount of 808,199 represent fees associated with the SKU(s) purchased in the Underlying Order Form(s) and any additional SKU(s) purchased under this Order Form. In the event the Order Term of this Order Form is prior to or exceeds the Order Term end date in any Underlying Order Form(s), Customer's use of Workday Success Plan for the SKU(s) purchased in this Order Form will be effective through the Order Term end date in this Order Form; use of Workday Success Plan for SKU(s) purchased in the Underlying Order Form(s) will be effective through the Order Term end date of the Underlying Order Form(s).

The parties previously executed an Order Form for Adoption Kits (AK) and/or Learn-on-Demand (LOD) (the “**Prior Order Form**”), which remains in full force and effect without any option for renewal, until the end of the Order Term set forth therein. For clarity, this Order Form does not duplicate the rights or obligations of either party under the Prior Order Form. In the event of a conflict between the terms of the Prior Order Form and this Order Form, the terms of this Order Form shall prevail.

## 3. Growth and Expansion.

Customer will report to [subscriptions@workday.com](mailto:subscriptions@workday.com) as specified in the Underlying Order Form(s) for the metrics as provided below. Due to the Add-On Services shown in the Subscription Rights Table, the Expansion Rate(s) in the Underlying Order Form(s) are incrementally increased as provided below:

### a. Additional Metric Reporting based on total cumulative number.

Reporting for the following SKU(s) is based on the total cumulative number set forth in the Subscription Rights Table for the 12-month period preceding the Count Date. For avoidance of doubt, if the first year is a partial year, reporting is based on Customer's full annual entitlement outlined in the Subscription Rights Table.

#### i. Additional Metric Expansion Table

SKU	Additional Metric Increase	Annual Expansion Rate for Additional Metric Increase
ACC	Each increment of 25M Additional Accounting Source Input Rows	108,666

Notwithstanding the foregoing, at any time during the Order Term, Customer may purchase a one-time increase for an additional twelve (12) months of reporting history for Accounting Center for a total of 27 months of reporting history ("**Reporting History Expansion**") at the rate set forth in the Reporting History Expansion table below. Customer agrees to execute an Order Form documenting the fees for the Reporting History Expansion and pay the applicable fees which will be coterminous with this Order Form. Customer understands the Accounting Center Annual Expansion Rate above will be incrementally adjusted by the Annual Expansion Rate for Reporting History below. Customer will provide notice to [subscriptions@workday.com](mailto:subscriptions@workday.com) to exercise this option.

**Reporting History Expansion Table**

SKU	Reporting History Expansion	Annual Expansion Rate for Reporting History
ACC	12 Months	27,166 per 25M Accounting Source Input Rows

**b. Additional Metric Reporting based on highest daily number.**

Reporting for the following SKU(s) is based on the highest daily number set forth in the Subscription Rights Table for the 12-month period preceding the Count Date. For avoidance of doubt, reporting at the end of Year 1 is based on Customer's full annual entitlement outlined in the Subscription Rights Table.

**i. Additional Metric Expansion Table**

SKU	Additional Metric Increase	Annual Expansion Rate for Additional Metric Increase
XTND-APP-3PK	Each increment of 3 additional Applications	70,000

**Workday Success Plans Reporting.**

An additional fee of 12.0% will be added for Workday Success Plan for any excess Subscription Rights.

**Customer Contact Information**

	<b>Billing, In Care of</b> Responsible for payment processing and will receive invoicing and billing-related communications	<b>Customer Support</b> Main point of contact for Workday Support and will receive initial login credentials
Contact Name	Amy Wharton	Brandon Prosser
Street Address City/Town, State/Region/County, Zip/Post Code, Country	116 Meeting Street Charleston South Carolina 29401 United States	116 Meeting Street Charleston South Carolina 29401 United States
Phone/Fax #	(843) 579-7596	(843) 579-7596
Email (required)	whartona@charleston-sc.gov	prosserb@charleston-sc.gov
Internal Reference or PO (optional)		
Tax Exempt? Yes / No		If yes, US Exemption Tax Certificate or FST/VAT Number

<b>Customer Information</b>	<b>Initial Named Developer Site Admin</b>
Contact Name	Brandon Prosser
Phone/Fax #	
Email (required)	prosserb@charleston-sc.gov

For customers based in the U.S., certain portions of the Service included in this Order Form can be used with optional downloadable software components ("Downloadable Components"). Any applicable tax for Downloadable Components will be separately presented on the invoice based on a valuation attributed to the

Downloadable Components. As of the effective date of this Order Form, there is no value attributed to any of the Downloadable Components.

The Total Subscription Fee is based on the maximum indicated in the Subscription Rights table, and any use in excess of the maximums indicated will be subject to the terms in the Underlying Order Form(s), if applicable. Customer understands that the Base Subscription Fee for the Renewal Term of this Order Form is 229,967 which does not include any annualized fees for Workday Success Plan. These fees are incremental to the Base Subscription Fees in the associated Underlying Order Form(s). The Annual Renewal Subscription Fees in the Renewal section of the Underlying Order Form(s) are valid only if Customer's Base Subscription Fee plus all annualized fees for Workday Success Plans in any subsequent Order Form is equal to or greater than the total Base Subscription Fees from this Order Form, any Underlying Order Form(s), and any subsequent Order Form(s).

At the time of Renewal, Workday Success Plans fees will be calculated based on the greater of either the minimum fee or 12.0% of the annual fee of all eligible Renewal fees. This includes any Base Subscription Fee(s) in this Order form and the Base Subscription Fees in the Underlying Order Form(s).

This Order Form is only valid and binding when executed by both parties and is subject to the additional terms in the above-referenced MSA, the Underlying Order Form(s), or related renewal Order Form in effect, and any Addendums and Exhibits attached hereto. In the event of a conflict, the provisions of this Order Form take precedence over the MSA and its exhibits and attachments. The parties further agree to the terms in the following Additional Terms and Conditions Addendum(s): Extend, Accounting Center, located at <https://www.workday.com/en-us/legal/contract-terms-and-conditions/index.html>. Capitalized terms not defined herein shall have the same meaning as the Underlying Order Forms and MSA. An active HCM/FIN subscription is required for use of the Service applications listed herein. All purchase order forms, tax exemption certificates and FST/VAT/business registration, supplier setup requests, and invoice inquiries shall be submitted to [Accounts.Receivable@workday.com](mailto:Accounts.Receivable@workday.com).

THE VALIDITY OF THIS ORDER FORM IS CONDITIONED ON WORKDAY RECEIVING FROM CUSTOMER A SIGNED COPY OF THIS ORDER FORM BY NO LATER THAN 5 PM EST ON JANUARY 21, 2026 ("Deadline"). Notwithstanding the foregoing, this Order Form shall be valid if Workday, in its sole discretion, accepts an Order Form received after the Deadline. Workday will notify the Customer in the event Workday does not accept the Order Form.

IN WITNESS WHEREOF, this Order Form is entered into as of the Order Form Effective Date.

**City of Charleston**

Signature

Name

Title

Date Signed

**Workday, Inc.**

*Marina Chinn*

Marina Chinn (Dec 22, 2025 14:22:19 PST)

Signature

Name

Title

Dec 22, 2025

Date Signed

**WORKDAY SERVICE SKU DESCRIPTIONS ADDENDUM**

Customer may only use the Service SKUs subscribed to as indicated in the body of this Order Form.

Service	Description
Accounting Center	Accounting Center ingests operational transactions from business systems which need accounting generated to create detailed accounting journals and post to the general ledger. Accounting Center enables configuration of worktag mappings and maintenance of accounting rules in a centralized solution.
Extend Professional	Workday Extend enables organizations to use extensions to Workday Service applications and to use custom applications with Workday Service applications, provided such extensions and applications were created under the Workday Extend Developer Program. Workday Extend Professional includes additional tooling to build extensions and applications.

## COMMITTEE / COUNCIL AGENDA

<b>TO:</b>	William S. Cogswell, Jr., Mayor		
<b>FROM:</b>	Jason Kronsberg	<b>SECTION</b>	Facilities and Capital Projects - Parks
<b>SUBJECT:</b>	NRPA RECYCLING GRANT AWARD ACCEPTANCE		
<b>REQUEST:</b>	Approval to accept the National Recreation and Park Association's 2025 Show Your Park Some Love Recycling grant award in the amount of \$10,000.00 to add new recycling bins and programming at Brittlebank Park. There is no City match.		
<b>COMMITTEE OF COUNCIL:</b>	W&M	<b>DATE:</b>	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	Signature of Individual Contacted	Attachment
<u>Corporate Counsel</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Julia Cogswell</u>	<input type="checkbox"/>
<u>Cap. Proj. Comte. Chair</u>	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
<u>Section Chief</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Jason Kronsberg</u>	<input type="checkbox"/>
<u>Grants Compliance Man.</u>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Cherie Ann Lator</u>	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: \_\_\_\_\_ Account #: \_\_\_\_\_

Balance in Account \_\_\_\_\_ Amount needed for this item \_\_\_\_\_

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

CFO's Signature: Jamy Wharton

**FISCAL IMPACT:**

There is no City match.

Mayor's Signature: \_\_\_\_\_ William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.



## MEMORANDUM OF UNDERSTANDING

This Memorandum of Understanding (MOU), entered into as of the date of the last signature affixed hereto (Effective Date), is made between National Recreation and Park Association, Incorporated a New York not-for-profit corporation and Section 501(c)(3) organization located at 22377 Belmont Ridge Road, Ashburn, Virginia, 20148 ("NRPA" or "Grantor") and City of Charleston, a political subdivision of the State of South Carolina, ("Grantee"), and a provider of park, recreation, or community services within its municipal boundaries.

Grantee will be responsible for the financial oversight, design, construction, reporting and project management of this project throughout the length of the MOU. Grantee is the owner of the site and project, collaborator on grant deliverables, such as reporting, events, and other activities, and will be responsible for ongoing maintenance of the project and ensuring all grant deliverables are met and the project is completed in accordance with the terms of this MOU.

### **1. Purpose**

The purpose of this MOU is to confirm approval of the terms governing the acceptance and use of Ten Thousand Dollars (\$10,000) (Grant Funds) made available to Grantee for the implementation of the project selected for grant funding (Project): Show Your Park Some Love at Brittlebank Park.

Made possible, in part, through the support of Niagara Bottling, LLC, NRPA is managing the administration of the grant program (Program). Grants made through this Program are intended to build community pride through recycling awareness.

Having been selected as a recipient of Grant Funds through this Program, Grantee is required to accept the terms contained within this MOU in order to receive the Grant Funds as a grant recipient.

### **2. Project Funding**

- A.** Within thirty (30) days upon execution of this MOU and delivery to NRPA, NRPA will send Grantee a check in the amount of Ten Thousand Dollars **(\$10,000.00)**
- B.** Grant Funds will be distributed by NRPA
- C.** No matching funds are required

### **3. Grantee Requirements**

Grantee will use the Grant Funds to:

- A.** Host two or more local community events that educate, celebrate and engage community members in hands-on park-based recycling activities.
- B.** Promote collaboration with NRPA and Niagara Cares through displaying Show Your Parks Some Love campaign messaging.



NATIONAL  
RECREATION AND PARK  
ASSOCIATION

- C. Grantee may be asked to host a site visit for NRPA and/or Niagara Cares, and/or support NRPA in developing video content profiling agency's innovative efforts and successful strategies employed.
- D. Participate in evaluation activities and data collection that includes completing a grantee final event report. This information may be used to provide additional non-monetary awards in competition with other park and recreation agencies.
- E. Grantee will promote receipt of Grant Funds and success of Project through one or more strategy; press release, on-site event, including an opportunity for a Love Your Happy Place campaign representative to speak, and ongoing social media.

#### **4. Promotion**

NRPA and Niagara Bottling may use the Grantee and/or park names, photos, and/or information in connection with the Project for promotional or other purposes associated with the Project, in any and all media, without limitation and without further payment, notification, or permission, except where prohibited by law. If the grantee's photo release form does not cover promotional and other uses, NRPA can provide one upon request.

Grantee shall provide NRPA an opportunity to review and approve any statement, message or use of grantor logo related to this grant or Project in advance of its release to the public. Any promotion, public announcement, or promotion relating to the Grant shall be subject to the prior review of Niagara.

#### **5. Limits of Liability**

To the fullest extent permitted by applicable law, Grantee hereby releases Niagara Bottling and NRPA, and each of their directors, officers, managers, members, employees, agents, attorneys, advisors, consultants, volunteers, and other like parties (collectively the Support Parties), from any liability whatsoever relating to or arising out of the Project or the use of the Grant Funds. Grantee further waives any right to sue or bring any action of any kind against the Support Parties relating to or arising out of the Project or the use of the Grant Funds. NRPA's liability, if any, arising out of or in any way related to the relationship and/or dealings between NRPA and Grantee, shall be limited to the payment amounts paid pursuant to this MOU. NRPA shall not be liable for any damages caused by or arising out of the acts or omissions of a third party.

#### **6. Confidentiality**

During the term of this MOU, the parties may learn certain confidential information of each other. For purposes of this MOU, confidential information means the confidential and proprietary information, not generally known by non-party personnel, used by the disclosing party and which is proprietary to the disclosing party, and includes, without limitation, the disclosing party's trade secret or proprietary personnel, financial, marketing and business information, including strategic, operations and other business plans or forecasts, and confidential information provided by the disclosing party regarding its employees, customers, vendors, sponsors and other contractors. The receiving party shall: (i) protect and safeguard the confidentiality of the disclosing party's confidential information with at least the same degree of care as the receiving party would protect its own confidential information, but in no event with less than a reasonable degree of care; (ii) not use the disclosing party's confidential information, or



permit it to be accessed or used, for any purpose other than to exercise its rights or perform its obligations under this MOU; and (iii) not disclose any such confidential information to any person, except to the receiving party's officers, employees, consultants, accountants, and legal advisors who are bound by written confidentiality obligations and have a need to know the confidential information to assist the receiving party, or act on its behalf, to exercise its rights or perform its obligations under this MOU.

## **7. Term**

This MOU shall be effective as of the Effective Date hereof and shall continue until June 30<sup>th</sup>, 2026 (the "Term") in accordance with Section 11.

## **8. Use of Grant Funds**

The Grantee shall use the full amount of the Grant Funds exclusively for the purposes set forth in Section 1. Unless otherwise agreed in writing by the Grantor, the Grantee shall return any portion of the Grant Funds and the income earned thereon that is not expended for such purposes in accordance with Section 9.

The Grantee agrees not to use any portion of the grant or any income derived from the grant for the following:

- A. To carry on propaganda or otherwise attempt to influence legislation within the meaning of Section 4945(d)(1) of the Internal Revenue Code of 1986, as amended (the Code);
- B. To influence the outcome of any specific public election or to carry on, directly or indirectly, any voter registration drive within the meaning of Section 4945(d)(2) of the Code;
- C. To provide a grant to an individual for travel, study, or similar purpose within the meaning of Section 4945(g) of the Code, without prior written approval of Grantor.
- D. Payments of salaries, other compensation, or expense reimbursement to employees of the Grantee within the scope of their employment do not constitute "grants" for these purposes and are not subject to these restrictions;
- E. Except as expressly may be authorized in the approved Project, to provide a grant to any other organization without prior written approval of the Grantor; or
- F. To promote or engage in the following, but not limited to, acts that would create civil liability, criminal acts, criminal acts of violence, terrorism, hate crimes, the destruction of any state, or discrimination on the basis of race, national origin, religion, military and veteran status, disability, sex, age, or sexual orientation, or support of any entity that engages in these activities.
- G. To travel to NRPA's Annual Conference or any other conference travel.

## **9. Audit**



Grantee is expected to keep and maintain detailed books and records relating to the Grant, and the Grant Funds (including, without limitation, all uses thereof and expenditures therefrom) (collectively, the "Records") during the Term and for a period of seven (7) years thereafter (the "Audit Period"). NRPA and its assigns have the right to audit the Grantee's financial records relating to this MOU upon not less than ten (10) business days' advance written notice to Grantee by NRPA at any time during the Audit Period, at NRPA's sole expense, during Grantee's normal business hours. If as a result of an audit, NRPA determines that Grant Funds were not spent in accordance with the purposes of this Grant, the Grantee shall: (1) be required to return any Grant Funds not substantiated, and (2) reimburse NRPA for all costs and expenses incurred in connection with such audit. If NRPA determines that Grant Funds were used for fraudulent purposes, the Grantee shall be barred from participation in any further programs. Grantee shall further indemnify, defend, and hold the Support Parties harmless from any acts or omissions relating to its fraudulent use of the Grant Funds.

#### **10. Termination and Repayment**

Either party may terminate this MOU at any time for any reason upon providing the other party thirty (30) calendar days' written notice. Further, either party may terminate this MOU at any time effective upon receipt of written notice by the other party of failure to perform. The non-performing party shall have thirty (30) days to cure its obligation to the satisfaction of the other party. If the non-performing party fails to satisfactorily cure its obligation within this time this MOU will be terminated.

Grantee shall be required to repay the Grant Funds (either in full or in part, as set forth below) to NRPA in any of the following circumstances, as follows:

- A. In the event work on the Project is terminated or discontinued for any reason, or in the event work on the Project is suspended without just cause for a period of thirty (30) consecutive days or more, Grantee shall promptly repay to NRPA any portion of the Grant Funds not already spent (subject to and in accordance with all of the terms and conditions hereof) as of the effective date of such termination, discontinuance or suspension.
- B. In the event any portion of the Grant Funds is not spent by Grantee in accordance with the terms and conditions hereof during, or remains unspent as of the expiration of, the Term, or such other end date as the parties shall subsequently agree upon in writing, the Grantee shall repay such amounts to NRPA within ten (10) calendar days following the expiration of the Term.
- C. In the event Grantee fails to satisfy, or materially breaches, any of the terms and conditions of this MOU, Grantee shall, upon demand by NRPA, promptly repay the full amount of the Grant Funds to NRPA.
- D. In the event that this MOU is terminated for any reason, Grantee shall promptly repay to NRPA any portion of the Grant Funds not already spent (subject to and in accordance with all of the terms and conditions hereof) as of the effective date of such termination.

Neither party shall be liable to the other by reason of termination of this MOU for compensation, reimbursement or damages for any loss of prospective profits on anticipated sales or for expenditures,



investments, leases or other commitments relating to the business or goodwill of any of the parties, notwithstanding any law to the contrary. No termination of this MOU shall release the obligation to pay any sums due to the terminating party which accrued prior to such termination.

#### **11. Governing Law, Jurisdiction, Venue and Dispute Resolution**

Before commencing any litigation arising out of or relating to the relationship of the parties, this MOU, or the breach hereof, the parties agree to negotiate in good faith to resolve such dispute within fifteen (15) business days of notice by the other party of such dispute. The prevailing party in any action or litigation, including appeals, arising out of or related to this MOU shall be awarded its reasonable attorney's fees and costs. Grantee agrees that NRPA would not have an adequate remedy at law and would be irreparably injured if Grantee breaches its covenants hereunder and NRPA shall be entitled to injunctive relief as a remedy for any breach or threatened breach hereof without showing or proving any actual damages.

#### **12. No Agency**

Each party and its officers, employees, agents, contractors and/or consultants are independent contractors and are not, nor shall they hold themselves out to as or claim to be, employees or agents of the other party or any department, agency or unit thereof; accordingly, neither party shall have any authority to enter into any agreement on behalf of the other party or otherwise cause the other party to incur any obligations whatsoever other than as set forth herein.

#### **13. Notices**

All notices, requests, demands and other communications required or permitted under this MOU must be in writing and will be deemed to have been duly given, made and received only (a) when personally delivered, or (b) on the date specified for delivery when deposited with an overnight courier service such as Federal Express for delivery to the intended addressee, or (c) when sent via facsimile, only so long as followed by a hard copy sent in a manner set forth in (a) or (b) above, or (d) when delivered via email, only so long as followed by a hard copy sent in a manner set forth in (a) or (b) above, each of the foregoing addressed as set forth below:

If to Grantee, to:

City of Charleston  
Attn: Natalie Murdy  
116 Meeting Street  
Charleston, SC 29403

If to NRPA, to:

National Recreation and Park Association  
22377 Belmont Ridge Road  
Ashburn, VA 20148  
Attn: Ayanna Williams, Director of Community and Environmental Resilience



Email: [awilliams@nrpa.org](mailto:awilliams@nrpa.org)

*These parties have caused this MOU to be signed by their duly authorized representatives as of the last date set forth below.*

**National Recreation and Park Association**

**CITY OF CHARLESTON**

By: \_\_\_\_\_

By: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Printed Name: \_\_\_\_\_

Title: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

Date: \_\_\_\_\_

(6.)

## COMMITTEE / COUNCIL AGENDA

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Chief Chito Walker	DEPARTMENT	Police Department
SUBJECT:	FY25 KENNEDY CENTER ALCOHOL ENFORCEMENT TEAM GRANT		
REQUEST:	After-the-approval to accept an award for the FY25 Ernest E. Kennedy Center AET grant totaling \$5,000.00. Funds will help combat underage drinking and drug use with ID software and field intelligence training.		
COMMITTEE OF COUNCIL:	Ways & Means	DATE:	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	Signature of Individual Contacted	Attachment
Corporate Counsel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Eric Burchett</u>	<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Department Head	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Chito Walker</u>	<input type="checkbox"/>
Grants Coordinator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Andrea Heyward</u>	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: \_\_\_\_\_ Account #: \_\_\_\_\_

Balance in Account \_\_\_\_\_ Amount needed for this item \_\_\_\_\_

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

CFO's Signature:  Deputy CFO for Amy Wharton, CFO

**FISCAL IMPACT:** There is no match required for this grant.

Mayor's Signature: \_\_\_\_\_  
William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.



# CHARLESTON POLICE DEPARTMENT

Chito T. Walker  
*Chief of Police*

180 Lockwood Blvd. • Charleston, South Carolina 29403

To: Mayor Cogswell  
CC: City Council  
From: Chito Walker, Chief of Police  
Date: January 13, 2026  
Subject: FY25 Kennedy Center Alcohol Enforcement Team Grant

The Charleston Police Department requests after-the-fact permission to accept an award for the 2025 Ernest E. Kennedy Center Alcohol Enforcement Team Grant in the amount of \$5,000.00. There is no match required for this grant.

The South Carolina Department of Alcohol and Other Drug Abuse Services (DAODAS) has made funds available for the creation and support of Alcohol Enforcement Teams (AETs) in each judicial circuit to combat the issue of underage drinking in SC communities. Towards this goal, the City of Charleston Police Department agreed to conduct evidence-based strategies aimed at the issue of underage drinking in Charleston. In return for these activities, the Berkeley/Charleston County AET Team will award the City of Charleston Police Department funds to be used in their alcohol and drug enforcement duties.

CPD's project goal is to fund field intelligence training for the upcoming VICE Unit to combat underage drinking and drug use. Additionally, the funds will pay for licensing for the ID authentication software, Intelliecheck. This software is fully mobile, allowing officers to quickly verify the authenticity of IDs without having to return to their police cruiser.

**ATTACHMENT II**  
***Contractor Payment Request Form***

**DATE:** June 30, 2025  
**TO:** The Ernest E. Kennedy Center, 96 Wisteria Road, Goose Creek, SC 20445  
**FROM:** The City of Charleston Police Department

**PAYMENT PERIOD (month/year):** July 2024- June 2025

The source of these federal funds is the Substance Abuse Prevention and Treatment Block Grant of the U.S. Substance Abuse and Mental Health Services Administration, US Department of Health and Human Services, CFDA number – 93.959.

Activity	Milestone(s) Achieved	Total to be Paid
Public Safety Checkpoint		
Alcohol/Tobacco Compliance Check		
Underage Party Patrols/Dispersals		
Shoulder Tap Operations		
Fake ID/Bar Checks		
Reimbursable:		
Community Events/Presentations on Underage Drinking		
Underage Drinking Education/Alive at 25		
Training/Travel Expenses		
Other Expenses		
<b>TOTAL</b>		<b>\$5,000.00</b>

*"I certify that all expenditures reported and payments requested are for appropriate purposes and are in accordance with the agreed upon prices set forth in the contract document."*

---

**Signature of Official**

---

**Phone Number:**

---

**Title**

---

**Date**

---

**Prepared by (person to contact with questions)**

---

**Phone Number:**

7.)

## COMMITTEE / COUNCIL AGENDA

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Chief Chito Walker	DEPARTMENT	Police Department
SUBJECT:	FY26 KENNEDY CENTER ALCOHOL ENFORCEMENT TEAM GRANT		
REQUEST:	Approval to submit an application for the FY26 Ernest E. Kennedy Center AET grant in the amount of \$3,000.00. Funds will help combat underage drinking and drug use with ID software and field intelligence training.		
COMMITTEE OF COUNCIL:	Ways & Means	DATE:	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	Signature of Individual Contacted	Attachment
Corporate Counsel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Steve Renshaw</u>	<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>		<input type="checkbox"/>
Department Head	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Chito Walker</u>	<input type="checkbox"/>
Grants Coordinator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Andrea Heyman</u>	<input type="checkbox"/>

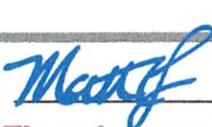
**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: \_\_\_\_\_ Account #: \_\_\_\_\_

Balance in Account \_\_\_\_\_ Amount needed for this item \_\_\_\_\_

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

CFO's Signature:  Deputy CFO for Amy Wharton, CFO

**FISCAL IMPACT:** There is no match required for this grant.

Mayor's Signature: \_\_\_\_\_  
William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.



# CHARLESTON POLICE DEPARTMENT

Chito T. Walker  
*Chief of Police*

180 Lockwood Blvd. • Charleston, South Carolina 29403

To: Mayor Cogswell  
CC: City Council  
From: Chito Walker, Chief of Police  
Date: January 13, 2026  
Subject: FY26 Kennedy Center Alcohol Enforcement Team Grant

The Charleston Police Department requests permission to submit an application for the 2026 Ernest E. Kennedy Center Alcohol Enforcement Team Grant in the amount of \$3,000.00.

The South Carolina Department of Alcohol and Other Drug Abuse Services (DAODAS) has made funds available for the creation and support of Alcohol Enforcement Teams (AETs) in each judicial circuit to combat the issue of underage drinking in SC communities. Towards this goal, the City of Charleston Police Department agreed to conduct evidence-based strategies aimed at the issue of underage drinking in Charleston. In return for these activities, the Berkeley/Charleston County AET Team will award the City of Charleston Police Department funds to be used in their alcohol and drug enforcement duties.

CPD's project goal is to fund field intelligence training for the upcoming VICE Unit to combat underage drinking and drug use. Additionally, the funds will pay for licensing for the ID authentication software, Intelliecheck. This software is fully mobile, allowing officers to quickly verify the authenticity of IDs without having to return to their police cruiser.

**The award amount varies based on the number of agencies that participate in the AET program and whether CPD completes all the terms of the agreement. However, the estimated award amount for the FY26 grant period is \$3,000.** There is no match required for this grant.

**Agreement between Berkeley/Charleston County AET Team and  
The City of Charleston Police Department FY26**

The South Carolina Office of Substance Use Services (OSUS) have made available funds for the creation and support of Alcohol Enforcement Teams (AETs) in each judicial circuit to combat the issue of underage drinking in SC communities.

The AETs are to implement evidence-based environmental strategies to reduce underage alcohol use, and its harmful consequences coupled with an active public education and prevention strategy. Enforcement of existing laws to restrict use and access by youth is one of our most useful tools in prevention, and prevention agency/law enforcement partnerships can lead to some of our most powerful and sustainable outcomes.

To support this goal the Berkeley/Charleston County AET Team will collaborate with the City of Charleston Police Department to conduct environmental strategies in the City of Charleston.

Towards this goal, the City of Charleston Police Department agrees to conduct evidenced-based strategies aimed at the issue of underage drinking in SC communities. In return for these activities, the Berkeley/Charleston County AET Team will award the City of Charleston Police Department funds to be used in their alcohol and drug enforcement duties.

The City of Charleston Police Department agrees to conduct at least 10 environmental strategies in their jurisdiction each month commencing July 1, 2026.

The environmental strategies will be documented in the AET online data system. Entries into the system must conform to the standard OSUS AET forms and be submitted on a monthly basis.

If the goal of 10 environmental strategies per month is reached, the AET Team will compensate the department for up to \$3,000.00.

The payment will be in one installment paid at the end of the fiscal year. The invoice will reflect evidence-based strategies conducted 7/1/25 through 6/30/26 and will total \$3,000.00. A list of allowable uses for these funds will be provided

Salaries, vehicles, building improvements, or any other non-equipment related expenses will not be reimbursed.

The City of Charleston Police or the Berkeley/Charleston AET can terminate this agreement at any time and for any reason.

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Berkeley/Charleston AET Designee Date

City of Charleston Police Department Designee Date

---

Witness

Agency

Date

## **Alcohol Enforcement Team FY2026 Contract Requirement**

**TO:** The City of Charleston Police Department  
**From:** The Ernest E. Kennedy Center, 96 Wisteria Road, Goose Creek, SC 29445

**CONTRACT/PAYMENT PERIOD (month/year): July 2025- June 2026**

**The source of these federal funds is the Substance Abuse Prevention and Treatment Block Grant of the U.S. Substance Abuse and Mental Health Services Administration, US Department of Health and Human Services, CFDA number – 93.959.**

### **Certification Regarding Debarment and Suspension**

Subgrantee certifies to the best of his or her knowledge and belief that Subgrantee, defined as the primary participant in accordance with 45 CFR Part 76, and its principals:

- 1) are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal Department or agency.
- 2) have not within a three- (3) year period preceding this grant been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification, or destruction of records, making false statements, or receiving stolen property;
- 3) are not presently indicted or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph 2) above; and
- 4) have not within a three- (3) year period preceding this grant had one or more public transactions (Federal, State, or local) terminated for cause or default.

Should Subgrantee not be able to provide this certification, an explanation as to why must be reported to OSUS in confidence before this grant's execution.

Subgrantee agrees by signing this grant that it will include, without modification, the clause titled "Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary Exclusion-Lower Tier Covered Transactions" in all lower tier covered transactions (i.e., transactions with Subgrantees and/or contractors) and in all solicitations for lower tier covered transactions in accordance with 45 CFR Part 76.

Please initial and date below:

\_\_\_\_\_ City of Charleston Police Department Designee

Date: \_\_\_\_\_

# COMMITTEE / COUNCIL AGENDA

8.)

TO:	William S. Cogswell, Jr., Mayor		
FROM:	Chief Chito Walker	DEPARTMENT	Police Department
SUBJECT:	SUBAWARD AGREEMENT FOR SCORF YEAR 3 – FAVOR LOWCOUNTRY		
REQUEST:	Approval to enter into a subaward agreement with Faces and Voices of Recovery (FAVOR) Lowcountry for services rendered as part of the Charleston Police Department's SCORF grant project.		
COMMITTEE OF COUNCIL:	Ways & Means	DATE:	January 13, 2026

**COORDINATION:** This request has been coordinated with: (attach all recommendations/reviews)

	Yes	N/A	Signature of Individual Contacted	Attachment
Corporate Counsel	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Brianne</u>	<input type="checkbox"/>
Cap. Proj. Cmte. Chair	<input type="checkbox"/>	<input type="checkbox"/>	<u>Chito Walker</u>	<input type="checkbox"/>
Department Head	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Chito Walker</u>	<input type="checkbox"/>
Grants Coordinator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<u>Andrea Heyward</u>	<input type="checkbox"/>

**FUNDING:** Was funding previously approved? Yes  No  N/A

If yes, provide the following: Dept./Div.: \_\_\_\_\_ Account #: \_\_\_\_\_

Balance in Account \_\_\_\_\_ Amount needed for this item \_\_\_\_\_

**Does this document need to be recorded at the RMC's Office?** Yes  No

**NEED:** Identify any critical time constraint(s).

**CFO's Signature:**  Deputy CFO for Amy Wharton, CFO

**FISCAL IMPACT:** FAVOR Lowcountry will be reimbursed up to a total of \$93,150.00 for services using funds from CPD's Year 3 SCORF allotment.

**Mayor's Signature:** \_\_\_\_\_  
William S. Cogswell, Jr., Mayor

**ORIGINATING OFFICE PLEASE NOTE:** A FULLY STAFFED/APPROVED (except Mayor's Signature) PACKAGE IS DUE IN THE CLERK OF COUNCIL'S OFFICE NO LATER THAN 10:00AM THE DAY OF THE CLERK'S AGENDA MEETING.



## CHARLESTON POLICE DEPARTMENT

Chito T. Walker  
*Chief of Police*

180 Lockwood Blvd. • Charleston, South Carolina 29403

To: Mayor Cogswell  
CC: City Council  
From: Chito Walker, Chief of Police  
Date: January 13, 2026  
Subject: Subaward Agreement for SCORF Year 3 – FAVOR Lowcountry

The Charleston Police Department requests approval to enter into a subaward agreement with Faces and Voices of Recovery (FAVOR) Lowcountry for services rendered as part of the Charleston Police Department's SCORF project.

Funding from the South Carolina Opioid Recovery Fund (SCORF) is designated to help mitigate the effects of the opioid crisis and direct resources to those affected by substance use disorder. To achieve this goal, the Charleston Police Department will partner with Faces and Voices of Recovery (FAVOR) Lowcountry to hire a Certified Peer Support Specialist (CPSS). The CPSS will work alongside CPD's Opioid Outreach Manager to follow up with survivors of non-fatal overdoses and connect them to recovery support services. Having guidance from someone with lived experience is crucial in the recovery process, and the CPSS will draw on their own journey to assist individuals with substance use disorders in starting their recovery.

The Charleston Police Department will use SCORF funds to reimburse FAVOR Lowcountry as a sub-grantee under its award, and both parties must sign a subaward agreement to formalize the terms of this partnership. Total reimbursement shall not exceed \$93,150.00 over the course of the year-long grant period. For further details about the subaward budget, please refer to Section IV of the agreement on page 4.

STATE OF SOUTH CAROLINA )  
COUNTY OF CHARLESTON )

**AGREEMENT BETWEEN THE CITY OF CHARLESTON AND  
FACES AND VOICES OF RECOVERY (FAVOR) LOWCOUNTRY**

**THIS MEMORANDUM OF AGREEMENT** (the “Agreement”) is hereby made and entered into by and between the City of Charleston (“City”) and Faces and Voices of Recovery (FAVOR) Lowcountry (“Contractor”), (collectively referred to as the “Parties”).

**WITNESSETH**

**WHEREAS**, Substance and opioid abuse disorders are chronic, progressive diseases that can lead to death if left untreated; and

**WHEREAS**, Contractor was founded in 2008 as part of a larger, nationwide network supporting individuals and families affected by substance and opioid abuse disorders committed to advocating for recovery friendly policies, providing resources for those in recovery, and promoting the message that recovery can be a reality for everyone; and

**WHEREAS**, over the past year, Contractor and the City of Charleston Police Department (CPD) have worked closely to design a peer-led approach to overdose follow-up and substance abuse disorder response; and

**WHEREAS**, South Carolina Opioid Fund (SCORF) grant funding will allow the parties to scale what they have already started, support a full-time Certified Peer Support Specialist (CPSS) from Contractor, provide technology for field work and formalize a peer-based engagement model within CPD to serve individuals most at risk for overdose and disengagement from care; and

**WHEREAS**, this Agreement is entered into by the Parties in order to establish a cooperative arrangement between the Parties to provide the necessary resources and support; and

**NOW, THEREFORE**, in consideration of these mutual promises and covenants set forth in this Agreement and the above-referenced recitals, which are incorporated herein by reference, the Parties agree as follows:

## **SECTION I: SCOPE OF SERVICES**

A. The parties agree that the Contractor shall furnish the following services:

1. Hire and supervise a CPSS to work with the CPD to provide overdose follow-up, referral for treatment and other services.
2. Work with CPD to provide similar services to citizens with other substance use disorders.
3. Work in partnership with the CPD Opioid Outreach Manager to help coordinate services for individuals beginning their recovery journey by utilizing the unique recovery experiences of the CPSS.
4. Coordinate with CPD Opioid Outreach Manager to provide Naloxone trainings with the City of Charleston and assist with providing Naloxone and other harm reduction supplies.
5. Distribute harm reduction kits (pencil box including 2 doses of Naloxone (4mg each), an informational pamphlet, face mask, and rubber gloves) and Fentanyl and Xylazine test strips.
6. Ensure that CPSS receives training on current “best practices” related to outreach to include attendance at the South Carolina Governor’s Addiction Summit in Columbia and 2 additional webinars and/or local trainings.
7. Provide quarterly data related to the CPSS’s activities to include in performance reports to the SCORF Board or more frequently if requested. Data may include SCORF-suggested performance metrics, KPIs outlined in FAVOR Lowcountry’s section of the SCORF application, and a monthly report of the amount of SCORF-funded naloxone distributed to the community (see appendix for a list of performance metrics).
8. Maintain adequate records that clearly support the charges and expenditures incurred under this project in the event of audit by the City of Charleston or the SCORF Board. Records should be retained for at least five (5) years following the end of the grant period.

B. The parties agree that City/CPD shall furnish the following services:

1. Work with and support CPSS's efforts to provide services, training and distribution of harm reduction kits as set forth in paragraph I.A.;
- C. Both parties shall safely, diligently and in a professional and timely manner perform in fulfilling their obligations as set forth in this Agreement.
- D. Both parties warrant and represent that they possess all necessary licenses to perform the services set forth in this Agreement, and are competent and able to provide professional and high quality goods and/or services to the other in accordance with this Agreement.
- E. The Contractor shall bill only for work performed in accordance with this Agreement. City shall not be liable to pay for additional work unless otherwise agreed in writing by the parties.

**SECTION II: COPYRIGHT AND OWNERSHIP** To the extent permitted by Title 17 of the United States Code, the Work Product is deemed a work for hire and all copyrights in such Work Product are the property of the City. In the event it is ever determined that any Work Product is not a work for hire under United States law, The Contractor hereby assigns to the City all copyrights to such work when and as created.

**SECTION III: CONTRACT TERM** The term of this agreement shall run from October 1, 2025 to September 30, 2026.

**SECTION IV: COMPENSATION AND PAYMENT TERMS** This Agreement authorizes payments not to exceed \$93,150.00. The Contractor shall invoice City on a monthly basis. Invoices must be accompanied by documentation supporting the listed charges. Documentation may include:

- a payroll register noting salary and the employer portion of benefits for all grant-funded employees;
- a time/effort sheet documenting time spent on the project;
- receipts/invoices for supplies, training, and travel; and
- proof of payment (for example, a bank statement or cleared check).

Payment terms shall be Net 30 days after receipt of an approved invoice by City. Payment to The Contractor shall be made after services have been rendered. The Contractor must submit an original invoice for each payment request to City.

\$93,150.00 is itemized as follows:

\$83,650.00 – salary and fringe benefits for one CPSS, CPSS's operational supplies (iPad, cellphone, cellphone service, informational trifold pamphlets and business cards), and 15% salary and fringe benefits for CPSS's supervisor.

\$8,000.00 – harm reduction kits for CPSS.

\$1,500.00 – training and associated travel expenses for CPSS.

#### **SECTION V: WARRANTIES AND REPRESENTATIONS**

- A. Both parties hereby represent and acknowledge that they are capable of performing the work hereunder.
- B. All equipment, materials, and supplies incorporated in the work covered by this Agreement and provided by the parties are to be of suitable quality for their intended purpose.
- C. Both parties warrant and represent that their staff are knowledgeable about and experienced in providing the services and goods specified in the work required in accordance with this Agreement and warrants that they will use their best skill and attention to provide the work and materials in a professional and timely manner.

**SECTION VI: SUBCONTACTORS** The Contractor shall not substitute any Subcontractor without the prior written consent of the City.

#### **SECTION VII: INDEMNIFICATION**

The Contractor hereby expressly agree to indemnify and hold the City harmless against any and all expenses and liabilities arising out of the performance or default of this Agreement as follows:

The Contractor expressly agrees to the extent that there is a causal relationship between its negligent, reckless or intentionally wrongful action or inaction, or the negligent, reckless or intentionally wrongful action or inaction of any of its employees or Subcontractors or any person, firm or corporation directly or indirectly employed by them, and any damage, liability, injury, loss or expense (whether in connection with bodily injury or death or property damage or loss) that is suffered by the City and its employees or by any member of the public, to indemnify and save the City and its employees harmless against any and all liabilities, penalties, demands, claims, lawsuits, losses, damages, costs and expenses arising out of the performance or default of this Agreement. Such costs shall include defense, settlement, court costs and reasonable attorneys' fees incurred by the City and its employees. This promise to indemnify shall include bodily injuries or death occurring to the City's officers, officials, employees and any person directly or indirectly employed by the City, the City's employees, the employees of any other independent contractors including Subcontractors, or to any member of the public. When the City submits notice, the other shall promptly defend any aforementioned action. This obligation shall survive the suspension or termination of this Agreement. The limits of insurance coverage required herein shall not serve to limit this indemnity obligation. The recovery of costs and fees shall extend to those incurred in the enforcement of this indemnity.

**SECTION VIII: INSURANCE REQUIREMENTS** The Contractor shall comply with all insurance requirements which are set forth in Exhibit A.

**SECTION IX: GRATUITIES AND KICKBACKS**

***Gratuities.*** It shall be unethical and a violation of this Agreement by The Contractor for any person to offer, give or agree to give any employee or former employee, or for any employee or former employee to solicit, demand, accept, or agree to accept from another person a gratuity or an offer of employment in connection with any decision, approval, disapproval, recommendation, preparation or any part of a program requirement or a purchase request, influencing the content of any specification or procurement standard, rendering of advice, investigation, auditing, or in any other advisory capacity in any proceeding or application, request for ruling, determination, claim

or controversy, or other particular matter pertaining to any program requirement of a contract or subcontract, or to any solicitation or bid therefore.

***Kickbacks.*** It shall be unethical and a violation of this Agreement by The Contractor for any payment, gratuity, or offer of employment to be made by or on behalf of a Subcontractor under a contract to the Contractor, or to hire any Subcontractor or any person associated therewith, as an inducement for the award of a subcontract or order.

## **SECTION X: TERMINATION**

***For Default:*** If The Contractor fails to comply with the terms of the contract the City shall notify The Contractor in writing of the specifics regarding such noncompliance. If The Contractor fails to begin to cure the noncompliance within five (5) days after the notice, the City may terminate the contract by written notice to The Contractor with a minimum of thirty (30) days thereafter and The Contractor shall only be compensated for services actually completed prior to termination, The Contractor shall not be entitled to any costs or damages resulting from a termination under this section.

## **SECTION XI: ASSIGNMENT**

The Contractor shall not assign in whole or in part any part of this Agreement without the prior written consent of the City. The Contractor shall not assign any money due or to become due to it under this Agreement without the prior written consent of the City.

## **SECTION XII: NOTICES**

All notices required under this Agreement to the parties shall be deemed properly given when deposited in

the United States mail, either by registered or certified mail (postage prepaid) to:

To the City:

Chief Chito T. Walker  
City of Charleston Police Department  
180 Lockwood Blvd.  
Charleston, SC 29401

With a copy to:

City of Charleston Corporation Counsel  
50 Broad Street  
Charleston, SC 29401

To The Contractor:

FAVOR Lowcountry  
Ed Johnson, Board Treasurer  
3030 Ashley Towne Center Dr., Suite 202B  
Charleston, SC 29414

### **SECTION XIII: CHANGE ORDERS**

No oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in this Agreement.

### **SECTION XIV: ENTIRE AGREEMNT**

This document and its Exhibits constitute the entire Agreement between the parties and all previous negotiations leading thereto. This Agreement shall be modified only by a written agreement signed by the City and The Contractor.

### **SECTION XV: GOVERNING LAWS**

The laws of the State of South Carolina shall govern this Agreement. All litigation arising under this Agreement shall be litigated in the Circuit Court in the Ninth Judicial Circuit of Charleston County, South Carolina, in the Court of Common Pleas.

### **SECTION XVI: LICENSE AND PERMITS**

The Contractor shall, without additional expense to the City, be responsible for obtaining all necessary licenses and permits required by the State of South Carolina, or the City of Charleston or any other authority having jurisdiction as necessary to fully perform its obligations pursuant to this Agreement. The Contractor shall provide a copy of its valid City of Charleston Business License to the City upon the execution of this Agreement.

#### **SECTION XVII: PUBLICITY RELEASES**

The Contractor agrees not to refer to the award of this Agreement in any commercial advertising in such a manner as to state or imply that the products or services provided are endorsed or preferred by the City. The Contractor shall not have the right to include the City's name in its published list of customers without prior approval of the City. With regard to news releases, The Contractor shall only be permitted to use the name of the City and the type and duration of this Agreement in any news releases provided The Contractor shall first have obtained the prior written approval of the City. The Contractor also agrees not to publish, or cite in any form, any comments or quotes from the City's employees unless it is a direct quote from the Public Information Officer of the City.

#### **SECTION XVIII: INDEPENDENT CONTRACTOR**

The Contractor is an independent contractor and shall not be deemed an employee of the City of Charleston for any purpose whatsoever. The Contractor acknowledges that it is The Contractor's duty to verify identity and eligibility of its employees and all sub-contractors in accordance with IRCA ("Immigration Reform and Control Act") as amended. The Contractor further agrees to indemnify the City if the Contractor fails to comply with IRCA as amended.

#### **SECTION XIX: SEVERABILITY**

If any provision of this Agreement shall be held to be invalid or unenforceable for any reason, the remaining provisions shall continue to be valid and enforceable. If a court finds that any provision of this Agreement is invalid and unenforceable, but that by limiting such provision it would become valid and enforceable, then such provision shall be deemed to be written, construed and enforced as so limited.

#### **SECTION XX: WAIVER OF CONTRACTUAL RIGHTS**

The failure of either party to enforce any provision of this Agreement shall not be construed as a waiver or limitation of that party's right to subsequently enforce and compel strict compliance with every provision of this Agreement.

#### **SECTION XXI: COMPLIANCE WITH LEGAL REQUIREMENTS**

All applicable Federal, State and local laws, ordinances, and rules and regulations of any authorities (including but not limited to any laws, ordinances or regulations relating to the SC Department of Revenue or the SC Board of Contractors) shall be binding upon the parties during the term of this Agreement. The parties shall be responsible for compliance with any such law, ordinance, rule or regulation, and shall hold the other harmless and indemnify same in the event of non-compliance as set forth in this Agreement.

#### **SECTION XXII: BACKGROUND CHECK**

The City reserves the right to conduct criminal background checks on individuals assigned to this project, including the CPSS, its other employees, agents or Subcontractors.

#### **SECTION XXIII: SC STATE AND LOCAL TAX**

Except as otherwise provided, contract prices shall include all applicable state and local taxes. If applicable, two percent (2%) income tax withholding shall be withheld from each and every payment pursuant to Section 12-9-310 of the South Carolina Code of Laws (1976, as amended) for certain out-of-state contractors, and such sums will be paid over to the South Carolina Department of Revenue and Taxation (the "SCDRT"). When and if the City receives an executed SCDRT form I-312, Nonresident Taxpayer Registration Affidavit – Income Tax Withholding, such withholding shall cease.

The Contractor shall calculate that portion of this Agreement that is subject to the nine percent (9%) South Carolina sales and/or use tax, which amount shall be itemized and shown on all invoices, and shall be paid to the SCDRT by The Contractor. If The Contractor is a non-South Carolina company, the City shall withhold said amount from all invoices and remit payment to the SCDRT, unless The Contractor furnishes the City with a valid South Carolina Use Tax Registration Certificate Number. The total of all sales tax to become due and payable in connection with this Agreement is listed herein.

The Contractor shall indemnify and hold harmless the City for any loss, cost, or expense incurred by, levied upon or billed to the City as a result of the Contractor's failure to pay any tax of any type due in connection with this Agreement.

#### **SECTION XXIV: NONDISCRIMINATION**

The contractor, sub recipient or subcontractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this contract. The contractor shall carry out applicable requirements of 49CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by the contractor to carry out these requirements is a material breach of the contract, which may result in the termination of this contract or such other remedy as the recipient deems appropriate.

#### **SECTION XXV: RELEASE OF INFORMATION**

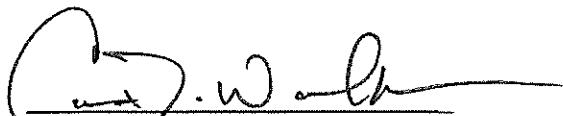
The city of Charleston adheres to the South Carolina Code Title 30, Chapter 4, "Freedom of Information Act," when releasing information upon receipt of a FOIA request. Contractor has a duty to clearly mark any information that is considered proprietary or a trade secret to be removed or redacted according to this statute. Failure to clearly mark proprietary or trade secret information waives any claims Contractor may make against the City regarding the release of information. The City makes best efforts to redact this type of sensitive information but is under no obligation per SC Code Section 30-4-40(a). Further, the City may, but has no obligation, to inform the Contractor should a FOIA request be made related to the release of Contractor's information.

The city of Charleston adheres to the South Carolina Rules of Court regarding the release of information pursuant to the receipt of a subpoena. Upon receipt of the subpoena where Contractor's information may be responsive material, the City will make a best effort to timely notify Contractor. Contractor must promptly notify City should they intend to quash or prevent any of this information from being released. Failure to notify the City of this intent to quash or prevent the release of information within forty-eight (48) hours of being notified of the receipt of the subpoena waives any claims the Contractor may have against the City for the release of Contractor's information.

The city also follows the South Carolina Department of Archives History records retention schedule and Contractor acknowledges that their records may be maintained and destroyed in accordance with these policies and schedules.

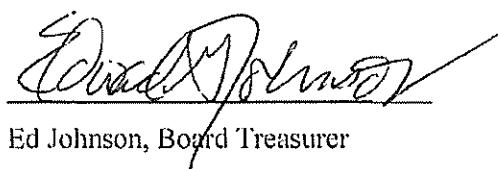
**IN WITNESS WHEREOF**, the Parties have hereunto set their hands and seals this  
\_\_\_\_ day of \_\_\_\_\_, 2025 .

**City of Charleston:**



Chito T. Walker, Chief of Police

**FAVOR Lowcountry**



Ed Johnson, Board Treasurer

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William S. Cogswell Jr., Mayor

**APPENDIX**  
**LIST OF PERFORMANCE METRICS**

**Proposal 1: Certified Peer Support Specialist (CPSS) and Supplies**

- SCORF-Suggested Metrics for Approved Uses: B. Support People in Treatment and Recovery
  - B.2 – Support and reimburse evidence-based services that adhere to the American Society of Addiction Medicine (ASAM) continuum of care for OUD and any co-occurring SUD/MH conditions.
    - No. of children (up to age 18) completing some form of detox
    - No. of children (up to age 18) connected to therapeutic counseling services
    - No. of children (up to age 18) connected to MOUD
    - No. of children (up to age 18) connected to professional mental health care
    - No. of children (up to age 18) connected to peer supports/recovery services
    - No. of children (up to age 18) tested for communicable diseases
    - No. of children (up to age 18) testing positive for communicable diseases
    - No. of children (up to age 18) connected to treatment for communicable diseases
    - No. of adults completing some form of detox
    - No. of adults tested for communicable diseases
    - No. of adults testing positive for communicable diseases
    - No. of adults connected to treatment for communicable diseases
    - No. of adults connected to therapeutic counseling services
    - No. of adults connected to MOUD
    - No. of adults connected to professional mental health care
    - No. of adults connected to peer supports/recovery services
    - No. of adults connected to housing
    - No. of adults connected to childcare
    - No. of adults connected to education or job training
    - No. of adults connected to a job / employment
- KPIs outlined in the SCORF application for this proposal:
  - Process Measure: Increase the number of citizens within the City of Charleston with SUD issues who receive referrals to services that will support their recovery and maintenance of their recovery from SUD
  - Outcomes Measures:
    - Increase the number of citizens who have experienced non-fatal overdoses who go into recovery, thus decreasing the number of fatal overdoses
    - Increase the number of citizens with SUD who interact with CPD who are referred to services that will support their recovery from SUD

### Proposal 2: Harm Reduction Kits for Certified Peer Support Specialist

- SCORF-Suggested Metrics for Approved Uses: H. Prevent Overdose Deaths and Other Harms (Harm Reduction)  
H.1 – Increased availability and distribution of naloxone and other drugs that treat overdoses for first responders, overdose patients, individuals with OUD and their friends and family members, schools, community navigators and outreach workers, persons being released from jail or prison, or other members of the general public.
  - No. of persons educated on how to respond to an overdose
  - No. of Naloxone kits distributed to at-risk individuals
  - No. of Fentanyl test kits distributed to at-risk individuals
- KPIs outlined in the SCORF application for this proposal:
  - Process Measure: Provide naloxone and harm reduction supplies
  - Outcome Measure: Increase the availability of opioid prevention items within the City of Charleston
- Monthly Naloxone Distribution Report:
  - No. of SCORF-funded naloxone packages distributed to the community each month

### Proposal 3: Training for Certified Peer Support Specialist

- SCORF-Suggested Metrics for Approved Uses: K. Training  
K.1 – Provide funding for staff training or networking programs and services to improve the capability of government, community, and not-for-profit entities to abate the opioid crisis.
  - No. of staff trained to improve the capability of government, community, and not-for-profit entities to abate the opioid crisis.
- KPIs outlined in the SCORF application for this proposal:
  - Process Measure: CPSS will attend the SC Governor's Addiction Summit and at least two (2) other training events for skill enhancement
  - Outcome Measure: Goal to observe improvements in the skill set of CPSS