

## **MEMORANDUM**

**To:** Mayor and City Council

**From:** Chris Pike, Finance Director

**Date:** May 26, 2015

**Subject:** **Public Relations and Marketing Vendor Selection for Municipal Service Providers**

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### **ITEM DESCRIPTION**

To approve a contract with Jacobs Engineering to provide Public Relations and Marketing Municipal Services beginning January 1, 2016.

### **BACKGROUND**

In December 2014, the mayor established a RFP evaluation team for the purposes of identifying firms that would be recommended to Council to provide the City with our municipal service providers when our current contracts expire at the end of 2015. The team consisted of Eric Linton, Billy Grogan, Sharon Lowery, Councilmember Riticher and Mayor Mike Davis. Michael Smith also served on the evaluation team for the areas he oversees. The RFP followed a similar format to the previous RFP in that seven service areas were identified; including Finance & Administration, Information Technology, Public Relations & Marketing, Public Works (including Stormwater), Parks, Planning & Zoning, and Permitting & Inspections.

During initial review of the scope of work, the evaluation team identified a few service areas where the current model of privatization did not hold benefit over a traditional employment model. The decision was made to remove the scope of services pertaining to those areas and recommend to Council those positions be hired on staff starting in January 2016. After proposals were received, scope related to the Parks Manager position was removed to be completed with in-house staff (new position) with the remaining scope moved to the Public Works Contract.

The City received proposals from 10 firms to cover 18 service areas; meaning several firms submitted proposals to provide multiple services to the City. The evaluation team read and scored each proposal using the criteria listed in the RFP. The proposals received indicated a service delivery similar to current operations, in most cases. Accordingly, you should expect the same professional service levels received from the past.

Cost proposals were provided to the City in a separate envelope and were not considered in the initial evaluation. After proposals were scored, the pricing proposals were then opened, scored and added to the technical proposals. Shortlisted firms were identified and interviewed by the team over a two-day period (April 20-21). Though not deliberate, all 10 firms were shortlisted for interviews for at least one of their proposed service areas. The evaluation team allowed the proposers to submit clarifications to their proposals and updated pricing after their interviews. The committee then recorded the updated scoring for those interviewed. Lastly, the City Manager and I negotiated best and final offers and final contract points with several firms.

#### ANALYSIS

Final scores for all firms are listed below with the commensurate final pricing. All cost figures reflect a five-year period covering 2016 through 2020.

<b>Proposals Evaluation COMBINED SCORES</b>	<b>Total Score</b>	<b>Pricing</b>
INFORMATION TECHNOLOGY		
<b>Interdev</b>	412.18	\$3,761,266
<b>Rocket IT</b>	392.76	\$2,621,764
INSPECTIONS & PERMITTING		
<b>Clark Patterson Lee</b>	449.99	\$2,500,000
<b>Nova</b>	422.33	\$3,400,000
<b>Bureau Veritas</b>	419.46	\$3,000,000
<b>Collaborative</b>	368.38	\$3,500,000
PLANNING & ZONING		
<b>Clark Patterson Lee</b>	390.04	\$4,970,000
<b>Collaborative</b>	372.13	\$2,169,318
<b>Bureau Veritas</b>	366.21	\$4,081,398
PUBLIC RELATIONS & MARKETING		
<b>Jacobs</b>	457.85	\$1,612,580
<b>Collaborative</b>	412.31	\$1,707,101
PUBLIC WORKS		
<b>Lowe</b>	557.24	\$4,078,331
<b>Jacobs</b>	517.61	\$4,621,548
PLANNING & PERMITTING COMBINED		
<b>Clark Patterson Lee</b>	848.17	\$7,470,000
<b>Bureau Veritas</b>	817.73	\$6,727,328
<b>Collaborative</b>	769.08	\$5,669,318

As you can see above, in several areas, the top ranked firm was also the lowest price, but that was not always the case. Many factors beyond cost were considered, and pricing provided 20% of the overall score. A firm could substantiate a higher price with increased services. Often the price was reflective of staffing levels or alternative delivery strategies so comparing just pricing would be inappropriate. Also, for all service areas, the “depth of bench” was given significant consideration; understanding a firm’s value extends beyond the staff they locate on site.

## **RECOMMENDED ACTION**

The evaluation team respectfully requests approval of contracts with (1) InterDev, LLC for provider of I.T. Municipal Services, (2) Jacobs Engineering Group, Inc. for provider of Public Relations and Marketing, (3) Lowe Engineers, LLC for provider of Public Works and Parks Support, and (4) Clark Patterson Engineers, Surveyor and Architects, P.C. for providers of Community Development including Planning & Zoning and Permitting & Inspections.

**MULTI-YEAR CONTRACT  
SERVICE PROVIDER CONTRACT  
RFP 15-01 MUNICIPAL SERVICE PROVIDER**

This **CONTRACT** for Public Relations and Marketing made and entered into this 26<sup>TH</sup> day of May, 2015 by and between the City of Dunwoody, Georgia (Party of the First Part, hereinafter called the "City"), and, Jacobs Engineering Group, Inc. (Party of the Second Part, hereinafter called the "Service Provider").

**NOW THEREFORE**, for and in consideration of the mutual promises and obligations contained herein and under the conditions hereinafter set forth, the parties do hereby agree as follows:

**1. TERM:**

The services to be performed under this Contract shall commence on January 1, 2016. The initial term of this Contract shall be through December 31, 2016. This Contract shall terminate absolutely and without further obligation on the part of the City on December 31 of each succeeding and renewed year, as required by O.C.G.A. §36-60-13, as amended, unless terminated earlier in accordance with the termination provisions of this Contract. This Contract may be automatically renewed on an annual basis for three additional twelve-month terms along with a fourth additional twelve-month term subject to Council approval, for a total lifetime Contract term of five years, upon the same terms and conditions, as provided for in this Contract, unless previously terminated. This Contract will terminate on December 31, 2020.

**2. ATTACHMENTS:**

Copies of the Service Provider's proposal, clarifications and modifications, including all drawings, specifications, price lists, Instructions to Bidders, General Conditions, Special Provisions, and Detailed Specifications submitted to the City during the Bid process (hereinafter collectively referred to as the "Bid ") as it relates to the Service Area of Public Relations and Marketing are attached hereto (Exhibit A) and are specifically incorporated herein by reference. In the event of a conflict between the City's contract documents and the Bid, the City's contract documents shall control.

**3. PERFORMANCE:**

Service Provider agrees to furnish all skill and labor of every description necessary to carry out and complete in good, firm and substantial, workmanlike manner, the work specified, in strict conformity with the Bid as it relates to the Service Area of Public Relations and Marketing.

**4. PRICE:**

As full compensation for the performance of this Contract, the City shall pay the Service Provider for the actual quantity of work performed. Bid amount shown on Exhibit A is the total obligation of the City pursuant to OCGA section 36-60-13 (a) (3). The fees for the work to be performed under this Contract shall be charged to the City in accordance with the rate schedule referenced in the Bid (Exhibit A). The City agrees to pay the Service Provider following receipt by the City of a detailed invoice, reflecting the actual work performed by the Service Provider.

**5. INDEMNIFICATION AND HOLD HARMLESS:**

Service Provider shall indemnify and hold completely harmless the City, and the members (including, without limitation, members of the City's Council, and members of the citizens' advisory committees of each), officers, employees and agents of each in accordance with the terms contained in General Conditions Section 7.14 of the RFP.

**6. TERMINATION FOR CAUSE:**

The City may terminate this agreement for cause as outlined in General Conditions Section Section 7.18 of the RFP. Such termination shall be without prejudice to any of the City's rights or remedies provided by law.

**7 TERMINATION FOR CONVENIENCE:**

The City may terminate this agreement for convenience as outlined in General Conditions Section Section 7.18 of the RFP.

**8. TERMINATION FOR FUND APPROPRIATION:**

The City may unilaterally terminate this Agreement due to a lack of funding at any time by written notice to the Consultant. In the event of the City's termination of this Agreement for fund appropriation, the Service Provider will be paid for those services actually performed. Partially completed performance of the Agreement will be compensated based upon a signed statement of completion to be submitted by the Service Provider, which shall itemize each element of performance.

**9. CONTRACT NOT TO DISCRIMINATE:**

During the performance of this Contract, the Service Provider will not discriminate against any employee or applicant for employment because of race, creed, color, sex, national origin, age, or disability which does not preclude the applicant or employee from performing the essential functions of the position. The Service Provider will also, in all solicitations or advertisements for employees placed by qualified applicants, consider the same without regard to race, creed, color, sex, national origin, age, or disability which does not preclude the applicant from performing the essential functions of the job. The Service Provider will cause the foregoing provisions to be inserted in all subcontracts for any work covered by this Contract so that such provision will be binding upon each subservice provider, providing that the foregoing provisions shall not apply to contracts or subservice providers for standard commercial supplies of raw materials.

**10. ASSIGNMENT:**

The Service Provider shall not sublet, assign, transfer, pledge, convey, sell or otherwise dispose of the whole or any part of this Contract or his right, title, or interest therein to any person, firm, or corporation except in accordance with General Conditions Section 7.20 of the RFP.

**11. WAIVER:**

A waiver by either party of any breach of any provision, term, covenant, or condition of this Contract shall not be deemed a waiver of any subsequent breach of the same or any other provision, term, covenant, or condition.

**12. SEVERABILITY:**

The parties agree that each of the provisions included in this Contract is separate, distinct and severable from the other and remaining provisions of this Contract, and that the invalidity of any Contract provision shall not affect the validity of any other provision or provisions of this Contract.

**13. GOVERNING LAW:**

The parties agree that this Contract shall be governed and construed in accordance with the laws of the State of Georgia. This Contract has been signed in DeKalb County, Georgia.

**14. MERGER CLAUSE:**

The parties agree that the terms of this Contract include the entire Contract between the parties, and as such, shall exclusively bind the parties. No other representations, either oral or written, may be used to contradict the terms of this Contract.

**15. TRAVEL COST REIMBURSEMENT**

If travel cost reimbursement is to be a part of this contract then the vendor must comply with the City's Travel Policy.

(Signatures Next Page)

**IN WITNESS WHEREOF**, the parties hereto, acting through their duly authorized agents, have caused this **CONTRACT** to be signed, sealed and delivered.

CITY OF DUNWOODY, GEORGIA

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

Michael G. Davis, Mayor  
City of Dunwoody, Georgia

ATTEST:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name  
City Clerk/ City of Dunwoody

APPROVED AS TO FORM:

\_\_\_\_\_  
Signature  
City of Dunwoody Staff Attorney

SERVICE PROVIDER: Jacobs Engineering Group, Inc.

BY: \_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Title

ATTEST:

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Print Name  
Corporate Secretary  
(Seal)

**CONTRACTOR AFFIDAVIT AND AGREEMENT**

By executing this affidavit, the undersigned contractor verifies its compliance with O.C.G.A. 13-10-91, stating affirmatively that the individual, firm, or corporation which is contracting with the City of Dunwoody has registered with and is participating in a federal work authorization program\* [any of the electronic verification of work authorization programs operated by the United States Department of Homeland Security or any equivalent federal work authorization program operated by the United States Department of Homeland Security to verify information of newly hired employees, pursuant to the Immigration Reform and Control Act of 1986 (IRCA), P.L. 99-603], in accordance with the applicability provisions and deadlines established in O.C.G.A 13-10-91.

The undersigned further agrees that, should it employ or contract with any subcontractor(s) in connection with the physical performance of services pursuant to this contract, contractor will secure from such subcontractor(s) similar verification of compliance with O.C.G.A 13-10-91 on the Subcontractor Affidavit provided in Rule 300-10-01-.08 or a substantially similar form. Contractor further agrees to maintain records of such compliance and provide a copy of each such verification to the City of Dunwoody at the time the subcontractor(s) is retained to perform such service.

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E-Verify \* User Identification Number

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Company Name

---

BY: Authorized Officer or Agent Date  
(Contractor Signature)

---

Title of Authorized Officer or Agent of Contractor

---

Printed Name of Authorized Officer or Agent

SUBSCRIBED AND SWORN  
BEFORE ME ON THIS THE

\_\_\_\_\_ DAY OF \_\_\_\_\_, 20\_\_

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Notary Public

My Commission Expires:

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\* As of the effective date of O.C.G.A. 13-10-91, the applicable federal work authorization program is "E-Verify" operated by the U.S. Citizenship and Immigration Services Bureau of the U.S. Department of Homeland Security, in conjunction with the Social Security Administration (SSA)



10 Tenth Street, 14<sup>th</sup> Floor  
Atlanta, GA 30309  
Ph: 404-978-7600

April 27, 2015

Chris Pike  
City of Dunwoody  
41 Perimeter Center East  
Suite 250  
Dunwoody, GA 30346

**Subject: RFP 15-01 Municipal Government Services Procurement**

Dear Mr. Pike:

Following our discussion with you on Friday April 22, 2015, I wanted to take the opportunity to respond to you and the City of Dunwoody with a slightly revised approach to our overall proposal.

In our initial cost proposal we included a discount of Bob Mullen's annual salary. We put a discounted rate in which was approximately 4% below his actual annual salary. Based on our discussions, we see a benefit of showing his actual annual salary within our cost breakdown, which would in turn demonstrate an opportunity for a lower overall burden rate.

By showing this actual annual salary rate, the Jacobs burden rate would be reduced from 1.675 to approximately 1.620. While this adjustment does not lower our overall price, or our financial proposal, it does reflect a burden rate which provides competitive value and services more in line with what you are seeking.

In addition, this approach helps us further enhance our back-of-office commitment to the City of Dunwoody and the experienced services we would be offering under the contract. For example, we have outlined a few services and capabilities we possess within the Jacobs "bench" which we believe will help broaden our service offering for the city.

- Videographer and video editing
- Renderings and animations
- Media Training/Presentation Training
- Public Information Planning and Facilitation

As the city and the Jacobs Communications team prepares and plans for future projects, initiatives and deliverables, there may be opportunities where these types of back-of-office talents and resources can be used and leveraged to provide support.

We believe this is a natural and advantageous evolution of our partnership with the city. We are passionate about the work we do and are committed to providing the City of Dunwoody with the breadth of skills appropriate for exceptional service delivery.

Kind regards,

Chuck Button



MUNICIPAL GOVERNMENT SERVICES  
PROCUREMENT



Dunwoody N9

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# SECTION I

Letter of Transmittal

(RFP) 15-01  
Technical Proposal

## MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

SECTION I  
Letter of Transmittal

Dunwoody N9



Ten 10<sup>th</sup> Street, Suite 1400  
 Atlanta, Georgia 30309 ·  
 T: 404.978.7600 / F: 404.978.7660  
 www.jacobs.com

March 27, 2015

City of Dunwoody  
 Attn: Chris Pike, CPA, Director of Finance  
 41 Perimeter Center East, Suite 250  
 Dunwoody, Georgia 30346

**RE: Jacobs – Municipal Government Services Procurement – Public Works, Parks and Recreation, and Public Relations and Marketing, RFP 15-01**

Dear Mr. Pike,

***Experience. Depth. Flexibility.***

These attributes describe what Jacobs brings to the City of Dunwoody. They also describe what Jacobs has been providing for the city for the past four and a half years as a partner on the Public Relations and Marketing program.

We are not only seeking to extend our relationship with the City of Dunwoody on your Public Relations and Marketing program but also provide you with a fresh perspective and approach to Parks and Recreation and Public Works. We are confident the combination of these three service areas, when placed under the Jacobs umbrella will provide economies of scale while also augmenting the delivery and results necessary for successful program implementation and management.

## **Our Team**

- **Experience** – We bring more than local government operations and management understanding, we offer experienced, quality people. We have first-hand knowledge of the vision, programs, plans, initiatives and goals the city has for the next five years and beyond. We have been on the ground in City Hall and in front of the Dunwoody community. We understand what it takes to attain success in Dunwoody and what the community expects from city staff and leadership. This familiarity is backed by highly experienced staff achievement successfully delivering your program.
- **Depth** – We offer you access to resources to extend capabilities and breadth of service. Our Team understands infrastructure. Our team is strong, knowledgeable, capable and familiar with capital projects, transportation engineering and parks planning and management. Our team also extends throughout our organization to provide complex and deep strengths for a multitude of needs. We understand there are many key positions currently filled by excellent people. Our deep bench and broad expertise allows us to supplement your existing staff, freeing you of the responsibility for full-time staffing.
- **Flexibility** – As leaders in infrastructure and construction management, we know each project and initiative is different from the last. Being nimble and flexible is necessary on these types of projects. We have the ability to bring in staff leaders with applicable, issue-specific technical expertise to assist on projects on an as-needed basis and also return back to the Jacobs bench, by-passing the need to have deep expertise full time. We offer an agile team that will act rapidly and efficiently.

At Jacobs our people are our most important asset. I am committed to making Dunwoody successful. I will be your contact on all staffing and team issues and can be available to the City at ANY time.

#11.

Chris Pike, City of Dunwoody

March 27, 2015

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These attributes provide the City of Dunwoody with the qualities, characteristics and professionalism to deliver results for the next five years and beyond. I am confident your selection of our team will bring lasting advantages and establish a trusted partnership dedicated to service.

Regards,

**JACOBS ENGINEERING GROUP INC.**



Chuck Button

City of Dunwoody Primary Point of Contact

Tel: 770.843.5111

Fax: 404.978.7660

Email: [Chuck.Button@Jacobs.com](mailto:Chuck.Button@Jacobs.com)

*We acknowledge this proposal may not be withdrawn for a period of 180 days after the time and date of proposal opening.*



## SECTION II

### Corporate Background and Qualifications

(RFP) 15-01  
Technical Proposal

#### MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

SECTION II  
Corporate Background and Qualifications

Dunwoody N9

# Corporate Background and Qualifications

## EXPERIENCE

- 67 years of engineering expertise, providing clients with high quality services
- 90% of our work is repeat business with satisfied clients
- Relevant experience on contracts similar to the City of Dunwoody's Municipal Government Services

## DEPTH

- We will become an award-winning example of City leadership in metro Atlanta and the country
- We possess 70,000 resources across our organization
- We will continue to encourage citizen participation with a web-based Citizens Dashboard

## FLEXIBILITY

- With 400 local employees in Atlanta area Jacobs is able to expand and contract employees as needs change
- With an organization in the metro area including planners, ecologists, media specialists, and architects, Jacobs can provide additional services that may be needed in the future.

Our local Jacobs team is empowered to deliver value and unique capabilities to the City of Dunwoody from across our global operations, while continually being measured in terms of service responsiveness. We provide a depth of resources unmatched by other firms. We will be active and engage our world-class steering committee to challenge our team with alternative ideas and best practices. Not only are we familiar with the operations and workings of Dunwoody's municipal governance, many of our employees have government public service backgrounds and bring a high degree of knowledge and respect for the services a city provides.

We are confident we can deliver exceptional service while significantly reducing the cost of this government services contract, allowing you to spend more revenue to enhance the quality of life for your residents and businesses. Together we will deliver unmatched services to take the city into its tenth year of success and beyond.

**Jacobs provides depth of services, unequalled industry expertise, and high caliber staff with local government experience at a cost-effective price.**

## ATTRIBUTES

Jacobs is a public company that manages and implements major programs for federal, state, and local governments, military, and private sectors. **Our culture of transparency and client relationships is woven into the fabric of every business practice.** Over 90% of our work is delivered to repeat clients. Our approach to customer service means that the core of our relationships with our clients is built on communication, openness, and our ability to complete any assignment given to us, thoroughly, completely, and with high quality.

We have been assisting local governments for over 67 years with infrastructure, parks and recreation, and communication needs. We have performed on-call contracts for many of the cities and counties in metro Atlanta, working with city and county leaders to deliver infrastructure and capital improvement projects, develop master plans, zoning ordinances, transportation improvements, community building and visioning exercises, and public information and involvement. We have over 400 employees in Georgia alone, with over 70% in

metro Atlanta, giving us access to a wealth of knowledge and expertise that smaller firms simply do not have.

## SPECIAL CAPABILITIES

The core reason Jacobs is the strategically sound choice for Dunwoody is our deep, back-of-house experience and leadership. This depth of resources allows us to reach anywhere in the Jacobs organization, pull in the necessary experts and resources, and assist the City of Dunwoody to grow in any department. For example, should you decide to start a solid waste management program, we have planners who have designed solid waste management plans who can assist in setting up the solid waste collection operations. We have assisted many clients in metro Atlanta and Georgia with these services for over 27 years, including the City of Columbus and Fulton, Clayton, and Coffee Counties. In Clayton County, we evaluated the county's entire solid waste program for economic viability.

One of the greatest risks facing this operation is customer service failures during transition of contractors. The first step in the development of our partnership with you will be a seamless transition period. Our dedicated Transition Team, led by **Chuck Button**, will use best practices and lessons learned from successfully transitioning local municipalities and county governments through professional services contracts and new initiatives. Chuck is a former Gwinnett County Manager and former Chief Operating Officer of Jordan, Jones and Goulding, Inc. (JJG). During the 2009 merger of Jacobs and JJG, Chuck led the smooth transition of over 300 employees into the Jacobs organization, assisting in all facets of human resources, operations, and finance. This experience gives him a unique perspective on how to transition existing employees into a new organization while maintaining work levels and efficiency.

Jacobs has international experience in the delivery of program management services. Starting with our local experience with running capital improvement programs in Athens-Clarke County, Gwinnett County, and Rockdale County, and extending to our worldwide experience delivering transportation services across the globe we

bring a team of experts and advisors to implement best practices and lessons learned to the City of Dunwoody.

## TECHNIQUES

The City of Dunwoody has been dedicated to improving the lives of its citizens through careful infrastructure planning and by investing in numerous capital improvement projects, even when many other municipal governments have been financially challenged. There is ongoing demand for more improvements and value-centric projects, including sidewalks and road improvements, and build-out of new park projects such as the Pernoshal Park and future upgrades to existing amenities like Brook Run Park.

**Using our lower corporate overhead, you get the best value for the dollars you spend on this contract so that more of the hard-earned taxpayer dollars go to pay for new investment in the community.**

Our communication and collaboration strategy is centered around the same system we use in our local office. In order to respond to information requests as quickly as possible, we propose to enhance the information gathering and reporting process with our Project Information Management System (PIMS), a proprietary software created by Jacobs to manage data. PIMS sits on top of existing software to provide a full featured reporting system, including an executive dashboard. It links critical information from many places and presents it in a single view.

As the integration piece that pulls information together, PIMS prevents redundancy and insures all team members have access to the most accurate information. It is a transparent, web-based system that allows secure access to anyone recognized by the system from any computer with internet access. It serves as a common platform for City staff, contractors, service providers, and other stakeholders.

Should you be interested in PIMS, we can also create a Citizens Dashboard from this system, a web-based



**Project Implementation Planning and Evaluation System**

Welcome, Robin Burner Pick Module To View  
Wednesday, February 16, 2011

Home → Project Search → Highway 41 Service Area Upgrades - Phase 1

(\*\*\* = Required Field) Print Friendly On Off

**Highway 41 Service Area Upgrades - Phase 1 - Property Acquisition**

Project Number: SFM0804  
Project Name: Highway 41 Service Area Upgrades - Phase 1  
Project Type: Capital  
Project Sub Type: Wastewater  
Project Class: Force Mains

Project Status: Active  
Phase: Construction  
Project Manager: Glennon, Jim  
Technical Lead: Glennon, Jim  
MPW Inspector: Wilson, Ronnie

MPW Operations Lead: Poretto, Gary  
Asset Class Engineer: Thomas and Hutton

Filter List

Add Project - Property Acquisition

Parcel	Tax Map ID	Owner Legal Name	Date Executed	Date Recorded	Book/Page	Amount Paid	Date of Paymet	Complete
2000	5941000313	Dunes West Property	8/13/2008	8/22/2008	0005/593	\$4,800.00	12/29/2008	Yes
2001	5830000056	Estate of James Smith				\$2,640.00		No
2002	5830000055	Estate of Edward Meyers				\$4,080.00		No
2003	5830000054	Gerald White	6/16/2008	8/13/2008	0003/679	\$525.00	12/29/2008	Yes
2004	5830000129	Nehemiah Corporation	6/25/2008	8/13/2008	0003/680	\$575.00	12/29/2008	Yes
2005	5830000301	James Capers, Jr.				\$835.00		Yes
2006	5830000302	James Capers, Jr.				\$1,770.00		Yes
2007	5830000047	Frank Rouse				\$2,170.00		Yes
2008	5830000042	Estate of Robert Gallon				\$2,560.00		No
2009	5830000365	Henry Swinton, Jr., et al				\$2,100.00		Yes
2010	5941000261	Ellington Woods, LLC				\$18,400.00		Yes
2011	5941000601	Ellington Woods, LLC				\$5,500.00		Yes

Figure 1: Sample of PIMS User Dashboard from Past Projects

system that will allow individuals to voice a concern and then monitor that concern through the response process by the City. We can further the application of the existing “See, Click, Fix” reporting system and provide citizens with an overall view of the concerns that have been addressed in their city.

This system is one of the keys to effective communication and collaboration. How information is managed and dispersed will be a key factor in effective communication and collaboration and critical to the success of the City’s programs. We can provide a seamless, collaborative environment for all stakeholders through the use of our PIMS system.

To effectively provide the quality of services required by the City of Dunwoody, lines of communication between staff and city personnel must be clear and direct. While PIMS can allow ready access to information in real-time, it does not replace the need for effective, face-to-face meetings. Joint meetings with the City Manager and the Service Area Directors will occur regularly to ensure all Departments are coordinating their activities and understand the City’s priorities. In addition, each Director will meet with their teams on a weekly basis to ensure each individual is fully informed.

Each Director will also meet with their counterpart in other Service Areas where the two Service Areas have “touchpoints” - those areas that require close coordination to ensure each Area knows what the other will need to effectively perform their work. For instance, **Kim Conroy, PE**, our proposed Assistant Public Works Director, will regularly meet with **Donald Fuller**, our Proposed Parks and Recreation Director, and the Parks and Recreation Department leadership to coordinate adjacent work, mitigate any schedule impacts from recreation programs or traffic improvements, and look for efficiencies such as instituting common subcontractor/vendor agreements for activities such as mowing, etc.

## QUALITY ASSURANCE/QUALITY CONTROL

Our Quality Assurance Program goes beyond monitoring the work; we also monitor your satisfaction. We have a comprehensive in-house quality program which includes periodic “client surveys” to identify our customer’s level of satisfaction with our services. The surveys begin with our initial Client Expectation Survey, which we will conduct at the inception of the phase-in task. We will use this survey as a basis to focus not only on the contract scope of services but also your priorities and sensitivities. We will then conduct follow-up surveys during the

course of the operation and make on-course corrections to the level and quality of services, constantly striving to meet or exceed your expectations.

## **So far this fiscal year, we have earned an average client satisfaction score of 92%**

Jacobs Value Plus (JV+), a tool for defining value brought to our clients and projects, is used to define, track, report, and recognize real value brought to you in the execution of the project. Using the JV+ process in FY2013, we provided \$6 billion of project savings to our clients. By using these tools, we will bring similar types of savings and enhancements to the City of Dunwoody's program.

## **RESOURCES**

We have over 400 local staff members in our Atlanta offices, supported by over 70,000 people throughout the Jacobs organization. Our Directors are fully empowered to reach out to anyone in the Jacobs organization to meet your needs. We are a well-respected and trusted organization, with strong financial performance.

## **Jacobs has been named one of *Fortune Magazine's* Most Admired Companies every year since the award's inception in 2006. In 2014, Jacobs was ranked No. 2 within the Engineering and Construction Industry category.**

In 2014 *Engineering News Record* ranked Jacobs No. 2 among the Top 500 Design firms in the country. We were also ranked No. 3 among Design-Build firms, No. 5 in Transportation, No. 7 in Highways, No. 7 in Airports, and No. 10 in Water by that publication.

## **SIMILAR PROJECTS**

Please see representative project experience on the next pages. In order to remain concise in our response, we have chosen the top 7 similar projects. Additional experience can be provided upon request.

## **LITIGATION**

As of March 23, 2015, the Submitting Firm, Jacobs Engineering Group Inc., has no current litigation with the City of Dunwoody or any other state, county or municipal entity in the State of Georgia. However, the Submitting Firm and its subsidiaries form an organization that is comprised of approximately 125 operating companies and affiliates, having a total current employment complement of over 70,000 persons and revenues of approximately \$11 billion. From time to time and in the ordinary course of its business, the Company is subject to various claims, disputes, terminations, arbitrations, and other legal proceedings. It is the Company's practice to vigorously defend itself in such actions, many of which are generally subject to insurance and none of which are expected to have a materially adverse effect on the Company's consolidated financial statements.

## **"BACK OFFICE" ATTRIBUTES, CAPABILITIES, AND RESOURCES**

In our Atlanta office, less than 15 miles away, we have over 400 staff members available to assist the City at a moment's notice. We have experts in all areas of transportation and traffic, land development and landscape architecture, parks and recreation planning, land use planning and zoning, survey, community involvement, historical preservation, environmental documentation, water and wastewater design, stormwater engineering, management and operations, geographic information systems (GIS), financial planning, information management systems, and much more.

## **Should the City need a consultant, engineer, professional, or scientist in any area of engineering, we have that person in the Jacobs organization, and very likely here in Georgia, who can begin working with the City immediately.**

These individuals include former high-level government officials, including County Managers, Public Works Directors, Parks and Recreation Directors, and Planning Directors for cities and counties, and former Georgia Department of Transportation (GDOT) and Atlanta Regional Commission (ARC) staff, who have knowledge and experience in all facets of government and government agencies. They understand the inner workings of government unlike anyone else and can serve as trusted advisors to the City of Dunwoody as you

look for growth to meet your goals and objectives in the coming years.

## FINANCIAL STATEMENTS

Jacobs is a publicly traded company and can provide financial statements and/or our annual report for the City, as needed.

# Communications, Marketing, and Public Relations Municipal Government Services Contract

## City of Dunwoody, Georgia

**Jacobs is providing communications, marketing, civic engagement and public relations services as part of municipal government services to the City of Dunwoody. The Marketing, and Public Relations contract covers all city communications programs, media relations and public relations activities; all print and online reports and official city reporting for the office of the City Manager and city departments; all electronic communications including website, social media, video and newsletter design, content and distribution; and graphics, maps, pictures and other publications.**



**Jacobs works to plan, promote and staff city events, special celebrations and public meetings to educate citizens and community members on the city programs and celebrate milestones and accomplishments.**

**Jacobs also provides strategic civic engagement program services to involve and inform citizens on the exciting and transformative projects within Dunwoody. Jacobs works with each city department to promote opportunities to engage with citizens and let them know everything the City is doing to create a better Dunwoody. As part of its Civic Engagement program, Jacobs coordinated and promoted public meetings, project briefings and open house events to educate, inform and involve residents and community members on important infrastructure projects and city initiatives.**



# Capital Improvement Programs Program Management

## Athens-Clarke County, Georgia

With over \$250 million dollars of capital improvements to be done in a five-year period, the Unified Government of Athens-Clarke County again retained Jacobs, acting as extension of staff, to provide Master Planning Consulting engineer services. Jacobs provides a full-range of services, including: service delivery planning, engineering design development, program management, project management, bidding, construction administration, and resident inspection for all the projects within the County's overall \$372-million Capital Improvement Plan.



The expansions include simultaneous development of all three wastewater plants from 18 million gallons per day (MGD) to 28 MGD; the continued expansion of their water treatment plant from 28 MGD to 36 MGD; erection of three new elevated storage tanks and rehabilitation of their existing four elevated storage tanks; construction of over 54 miles of new and expanded sewer lines (ranging up to 54 inches in diameter); and 17 miles of new water lines bringing water service to the entire County.

### Master Planning General Services Activities:

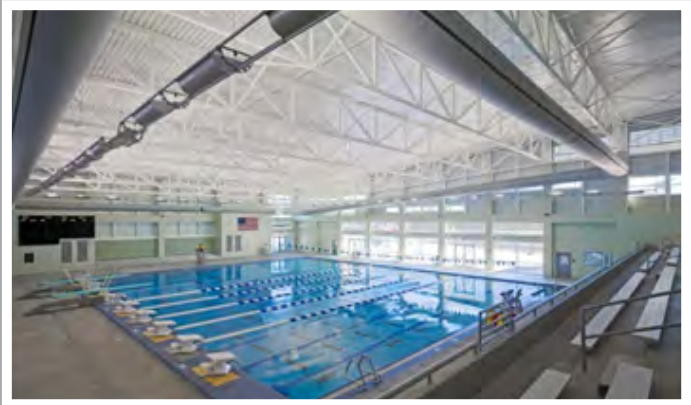
- Annual review of rates and system revenue requirements and an annual rate study
- Professional assistance in solving operational and maintenance problems
- Evaluation of compliance with federal, state, and local regulations
- Professional assistance in regards to long term planning associated with the Service Delivery Plan
- Environmental studies and permitting
- Public involvement
- Program management activities
- Master program scheduling
- Program information and reporting, including development/management of schedule and expenditures
- Preparation of design development reports
- Project feasibility studies
- Preparation of Request for Proposal (RFP) for detailed design services
- Assistance in RFP evaluation
- Management of design consultants/project specific
- Management of sub-contract work in regards to easement acquisitions
- Construction management services inclusive of resident inspection
- Project tracking to ensure compliance with budget and scheduling constraints

# Parks and Recreation Program

## Gwinnett County, Georgia

Gwinnett County voters have passed four, Special Purpose Local Option Sales Tax (SPLOST) since 1996, and the money collected funds parks, public safety, and transportation projects. The Parks and Recreation Program will have received over \$444 million from the SPLOST(s) over a 17-year period.

Jacobs was selected by the County for three consecutive five-year contracts and one four-year contract to provide out-source Program Management services for existing park renovation or redevelopment, and new park design and construction. Program Management services include both pre-construction and construction phase assistance, with particular emphasis on environmental and aesthetic sensitivity in design and execution of the projects. Specific relevant services to Dunwoody include:



- |   |   |
|---|---|
| ■ Program Services                              | ■ Contract Preparation and Administration |
| ■ Planning/Scheduling/Estimating                | ■ Resident Engineering and Inspection     |
| ■ Budgeting and Cash Flow Forecasting           | ■ Pay Request Management                  |
| ■ Design Standards and Design Review            | ■ Quality Assurance/Control               |
| ■ Value Engineering                             | ■ Submittal Management                    |
| ■ Constructability and Operability Reviews      | ■ Requests for Information                |
| ■ Architecture/Engineering Selection Assistance | ■ Change/Claims Management                |
| ■ Bid Preparation and Evaluation                |   |

Jacobs has managed, from design through construction, over 34 projects to date over the 19-year period, including four indoor (competition and instructional) and five outdoor (water park) aquatic facilities, six community centers, twelve athletic complexes (baseball, football, and soccer), two tennis centers, Chattahoochee river shoreline stabilization, numerous trails and playgrounds, two skate parks, and nine passive recreation parks.

Due in large part to the success of these programs, Gwinnett County received the 2008 Award from the National Recreation and Parks Association as the Best Parks & Recreation System in the nation and the voters of Gwinnett County approved, in November 2008, a continuation of the SPLOST funding for five more years of parks and recreation capital improvements.

# Roswell Municipal Court Services

## Roswell, Georgia

The City of Roswell faced many challenges running its courts system including improper implementation of court procedures, cases improperly inputted into computer systems, and citizen's dissatisfaction with the courts' customer service. As a result, City management entered into a contract with Jacobs to run its court operations.

Jacobs presented a budget that lowered the City's court employee count from nine to 4 ½ which in turn lowered their overall budget costs. Since the inception of the contract in October 2013 the City's court caseload backlog wait time for appearance has been reduced from 72 days to 30-40 days. Backlog of certain types of cases put into the system

have improved from several months to current and, in other areas, cases that were in the system for years for non-appearance have been reconciled and closed, significantly reducing the City's liability.

Before Jacobs took over in 2013, City staff and/or systems software errors resulted in numerous problems including accidental driver's license suspensions among other issues. Since then Jacobs has worked closely with the City and the Georgia Department of Driver Services (GADDS) to correct those errors and institute an organizational system to prevent future mistakes. Jacobs has also worked with Incode (court software vendor) with the goal of scanning all court documents into the system to improve overall efficiency and accuracy. As a result, the City of Roswell has received positive feedback from residents and local attorneys on the improved court operations and customer service.



## Professional Planning and Engineering Consultant Services

### City of Chamblee, Georgia

The City of Chamblee serves an estimated population of 27,500 and it includes approximately 7.6 square miles of area within its boundaries. The City has relied upon private contractors to handle the day-to-day operations of its Development Department for many years, but Jacobs was awarded this contract in 2013. Since then Jacobs has provided a full range of planning and engineering services including conducting the functions of planning, zoning administration, plan review permitting and other related tasks.



Jacobs provides four full-time professional staff including a Director, Senior Planner, Planning Technician, and Receptionist, and two part-time staff including a Deputy Director and Inspector. In addition, Jacobs provides on-call engineering and landscape architecture services to help process permitting activity.

As required from time to time, the City also uses Jacobs for special projects. For example, in December 2013 it approved the annexation of 2.8 square miles of land, and as a result contracted with Jacobs to update its Comprehensive Plan and revise its Zoning Ordinance and Development Regulations to properly meet the new service demands of the annexed area. The City has also contracted with Jacobs to undertake a streetscape master plan of a portion of Chamblee-Dunwoody



# Municipal Government Services Contract

## City of Sandy Springs, Georgia

Jacobs is providing municipal courts and parks and recreation management services as part of the municipal government services contract for the City of Sandy Springs. The Courts contract covers all work elements within Sandy Springs Municipal Court Services including court administration, recordkeeping, reporting, staffing, fee collections, calendars, and outside agency communications. The Parks and Recreation contract covers all Parks and Recreation Department management, recreation programming and system management, and park maintenance.



Jacobs has been a valuable partner since the City transitioned from one primary provider of General Government Services to five providers. As the manager of the City's Parks and Recreation department, Jacobs has successfully implemented efficiencies and strict cost supervision practices which have provided the City with expert service offerings for its park facilities and recreation programs. In addition, Jacobs has brought the court advantageous management of all compliance, monitoring, record keeping, and customer service. The successful balance of team expertise and results-oriented work being done by Jacobs is indicative of the quality of service and financially sound management that we can perform for Barrow County.



# Bear Creek Water Treatment and Transmission Facilities Operations and Maintenance Services

## Onconee County, Georgia

The Upper Oconee Basin Water Authority (UOBWA), a public body established under the laws of the state of Georgia, was established in the late 1980s with the purpose of planning and developing a regional water supply system for its member governments. The members are the counties of Oconee, Barrow, and Jackson, and the consolidated government of Athens-Clarke County, all located in northeast Georgia. The member counties purchase treated water from the Authority on a wholesale basis and provide retail service to their individual customers. Athens-Clarke County purchases raw water which feeds their treatment facility.



Jacobs provides full contract operations and maintenance services for the UOBWA. Services we have provided include:

- Facility operations and maintenance staff
- Regulatory compliance sampling
- Treatment process optimizing
- Wetlands monitoring and management
- Watershed management
- Reservoir water quality monitoring and management
- Predictive and preventive maintenance programs
- Reservoir impoundment dam monitoring and management

Projects under this contract have included:

- River Pump Station consisting of three vertical turbine pumps capable of withdrawing 60 MGD from the Middle Oconee River and lifting it to the water supply reservoir
- 21-MGD, conventional treatment facility featuring rapid mix, flocculation, sedimentation, and filtration
- High-service pump station with total pump capacity of 31.5 MGD
- Process of chemical capability consisting of alum, caustic, polymer, chlorine, powdered activated carbon, potassium permanganate, corrosion inhibitor, and fluoride

Total finished water clearwell capacity during this contract was 4.0 MG.

## SECTION III

### Response to Scope of Work

(RFP) 15-01  
Technical Proposal

## MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

SECTION III  
Response to Scope of Work

Dunwoody N9

# Response to Scope of Work

## DEPTH, EXPERIENCE

### Leadership Team

#### **Chuck Button, Point of Contact**

- 39 years of experience in management and leadership
- Will lead Transition Team and serve as Primary Point of Contact for the City
- Former Gwinnett County Manager, at the time fastest growing county in the country

#### **Kim Conroy, PE, Public Works**

- 30 plus years of experience at all levels of public works management and retired as the Transportation director in Gwinnett County

#### **Donald Fuller, Parks & Recreation**

- 30 plus years of experience in parks & recreation, including being former Director of Recreation at Gwinnett County

#### **Bob Mullen, PR and Marketing**

- A Dunwoody resident, has a proven track record for the past 4 years with the City

## FLEXIBILITY

- Leadership team has commitment to access Jacobs worldwide talent
- Button and Conroy have flexible schedules to provide additional services at your request

## 1. SERVICE DELIVERY OBJECTIVES, WORK ACTIVITIES, AND DELIVERABLES

### GENERAL SCOPE OF WORK

- a) Provide services under the direction of the designated City Official. Such services shall encompass all those duties and functions reasonably and customarily associated with delivery of the required services in accordance with local, state, and federal laws including, but not limited to, the City Charter, City ordinances, and laws of the United States and the State of Georgia. ***We are very familiar with this type of requirement having worked for cities in Georgia for over 50 years. In essentially all of those assignments, we have taken direction from the appropriate city official.***
- b) Comply with all OSHA and other applicable federal and state statutes, regulations and standards for workplace safety and all applicable laws regarding hazardous material and maintain all required Safety Data Sheets (SDA) forms on site at the City. ***Simply put, safety is an integral part of our culture and fundamental to our core values. At Jacobs, we have world-class processes and tools, but safety is a lifestyle and something we think about 24/7.***

***Jacobs' approach to safety extends beyond OSHA, government regulations, policy manuals, checklists, work processes, and the work environment. The company's corporate Health, Safety, and Environment (HSE) department is comprised of multiple levels of more than 500 experienced HSE professionals who act with a shared vision of experiencing zero injuries and incidents. Jacobs calls this approach BeyondZero and represents our culture of caring.***

***We treat every incident or injury as intolerable. We measure our recordable incidents to industry standards, but we understand that those numbers are real people. BeyondZero® is the articulation of our deep desire and commitment to make sure we do everything in our power to avoid any situation that could hurt our employees or put them at risk.***

*It is easy to talk about safety in abstract terms, but Jacobs is proactive about making the abstract come to life. The HSE department structure provides regional HSE staff support to operational counterparts and at each level of management. When working at client sites, Jacobs' projects are set up to be safe via the company's HSE Work Process Map (WPM), a key resource that organizes and structures a plan to execute safety as various phases of construction are performed. Extending from pre-mobilization to demobilization, deliverables are defined in each phase and experienced staff is assigned to execute the plan.*

*From commitment workshops and health and safety family days to safekeeping guides and HSE alerts, advisories, and safety share messages, Jacobs tries to make safety personal for all employees. Whether working on a project site or in an office location, we offer our employees a variety of safety training opportunities that are both relevant and meaningful to the work environment and the work being performed.*

*In the end, this safety strategy has created a reputation for Jacobs as a safe organization that delivers projects on time and on budget. Safety plays an important part in the company's ability to follow through on promises because safe work sites impact worker morale and performance.*

- c) Comply with all local, state and federal documentation retention requirements including, but not limited to, the City's document retention schedules, as adopted and amended by City Council. **We are familiar with record retention policies for municipal governments and under current practices comply with all records retention policies for the work at the City of Dunwoody. Our clients include cities, counties, authorities, states, and various federal agencies, each with their own unique requirements for document retention. For each client, at the start of the project we ensure the appropriate document retention schedules and procedures are in place and understood by our employees so that we are in compliance with these**

*requirements. For Dunwoody, we will focus on "e-files" since the vast majority of the documents will be electronic. We have a proprietary information system known as PIMS that propose to provide to Dunwoody. This system will be specifically tailored to your policies. For additional information about PIMS and a general description of its capabilities, please see Section II (Corporate Background and Qualifications) of this proposal.*

- d) Support the established culture throughout the City and community of Dunwoody. **Some of our employees live in Dunwoody and are actively involved in the community. As we discussed with these employee-residents, the key attributes and qualities they held for the City of Dunwoody closely matched those of Jacobs. Several of the positive characteristics our employees shared include defining qualities such as "traditional," "responsive" and "safe." Similar to Dunwoody, we hold close to a tradition of excellence in service for our employees and clients. These traditional elements affect how we work each and every day. Our responsiveness is underscored by the fact that much of our business is built on repeat clients who understand and value our commitment to service and attentiveness. And lastly, our steadfast devotion to safety resides at the core of our business philosophy. That's why we established our BeyondZero® culture of caring. We instill safe practices throughout our entire organization and by putting the health and safety of our employees first in everything we do, we strive to achieve a workplace free of incidents and injuries.**

- e) Promote information sharing and collaborative work between all City staff and Contractors. **We are accustomed to working with other contractors when providing services to our clients and understand the importance and relevance of collaboration versus independence or autonomy. We are a relationship-based firm and understand the importance of everyone working from the same information. To that end, we encourage the City to hold regularly scheduled meetings with all Departments so that information is shared in a**

***timely manner and is available to people quickly to improve the decision making process.***

- f) Identify, record and report relevant key performance indicators for contracted service areas. Contractor(s) shall submit monthly reports based on established key performance indicators. The Contractor shall commence tracking key performance indicators already established at the time of commencement, as well as, additional key performance indicators approved by the City Manager during the term of the contract. ***We establish and monitor performance measurements or Key Performance Indicators (KPIs) on our projects and will do this on the contract with Dunwoody. It is common for us to include client-established KPIs. We will keep this reporting accurate and current, reflecting the latest data and customizing the KPI information to go as deep as required.***
- g) Develop, implement, maintain, and improve strategies to attract and retain highly-qualified employees in the appropriate number to maintain the required level of service and to fill vacancies in staffing promptly as defined by the City for each position. ***We are constantly looking for talented people to provide great services to our clients. We have an aggressive recruitment program that includes visibility campaigns in national publications, on-campus recruiting at all the major universities, participation at state, national, and international professional conferences through attendance and presentations of technical papers, and presence on the major internet job-search sites. Job openings are also posted on our intranet and internet sites. Our recruitment team is organized as an international/virtual team that is constantly seeking to match openings wherever they may be with available personnel, either existing employees or individuals seeking employment. Our local operations management located in downtown Atlanta will stay in constant touch with the Service Area Leaders located at Dunwoody to be sure that any staffing need is anticipated and filled in a timely fashion. Annually, we evaluate our benefits package to be sure we remain competitive in the benefits we provide our employees.***
- h) Staff shall not be reassigned from the City without written approval; which shall not be reasonably withheld. Furthermore, Contractors shall not approach staff regarding potential reassignments (internal or external) without prior discussion with the City Manager or designee. ***Our relationship with our clients is imperative. In all of the cities that we have had similar contracts, we have always been in constant communication with management about the status of our personnel. Jacobs has never moved a team member from a contract without the consent of the client. We understand once staff is assigned and in place it is important to retain consistency of service and talent. We will not disrupt the approved team and personnel in Dunwoody unless otherwise directed to do so by the City Manager or his designee. We remain steadfast in this approach and will commit approved and assigned staff to be core team players.***
- i) Research current and relevant trends and laws that might have an impact on the City and service delivery, providing communication on the impact of the events to the City. ***We bring to Dunwoody our knowledge and experience providing similar services to our clients here in the United States as well as overseas (principally in the United Kingdom). As a large, global firm we must be constantly aware of the legal issues facing not only us but our clients. Our legal staff numbers over 60 and is available to advise you on emerging regional and national legal issues.***
- j) Identify and apply for grants matching strategic goals of the City. ***Jacobs has extensive knowledge and experience in obtaining funding from GDOT, FHWA, ARC and various other federal and state agencies. We have been successful in obtaining LMIG Developmental funds (in addition to the formula prescribed LMIG amount), GDOT Quick Response funds and ARC LCI money. We are also assisting clients with ARC's current Project Solicitation for STP Urban and TAP funds, and have extensive experience leveraging local funds by entering into partnerships with public agencies, CIDs and private businesses.***



- k) Provide the City with employees that have the technical knowledge to operate City-owned IT infrastructure and software within their respective departments (Please see Appendix D for the detailed list of City-owned software and hardware). ***We have reviewed the list in Appendix D and our proposed staff is competent in the effective use of applicable systems listed as well as many others that might be of benefit to Dunwoody. We recognize the increasing complexity of the technology we use to perform services for our clients. To address this, our Corporate IT Department has within it a separate global team known as Design Technology Services (DTS). These individuals focus on the non-enterprise wide technologies needed by our project teams and are available to advise Dunwoody on current and emerging technology. We use of many of these technologies and the companies providing the technology frequently seek our input on the future capabilities we desire.***
- l) Throughout the term of the contract, maintain and implement documented training programs to guarantee that contracted staff members remain at the top of their field throughout the duration of their specified assignment(s) with the City. ***We have staff development programs that include in-house training presented by inside and outside subject matter experts. Our staff also attend conferences to continue their education and present the latest advancements in their field. All this training is captured in our Learning Management System (LMS) which is connected to each employee's Human Resources Information System.***
- m) Prepare an annual document in collaboration with the City that outlines education and professional development provided to staff during the prior year and outlines training that will be delivered to the staff providing services, and provide said training to their employees. ***Annually, each employee and their supervisor meet to plan the next year's training for the employee taking into account the work assignments planned for that employee. We take the information developed for each employee and prepare the annual comprehensive training plan and budget estimate for presentation to Dunwoody.***
- n) Throughout the term of the contract, research and implement operational improvements to increase efficiencies, improve service and reduce operating expenses. ***Our management team, with years of local government experience, has knowledge to bring in fresh ideas to increase efficiencies, improve services, and reduce operation costs. Referring to the JacobsValue+ program we have saved in 2013 over \$6 billion in client savings.***
- o) Review all related processes, procedures and policies at least annually for amendments and improvements based on circumstances and industry standards changes. ***These activities will be performed in conjunction with those listed in the preceding item.***
- p) Maintain and account for all information, equipment, and property which the City provides to the Contractor for use during the period of performance. ***One of the first activities of the transition phase is to document those items provided by Dunwoody to Jacobs. We will update that list as changes occur and notify the City Manager promptly of any changes.***
- q) Manage all storage, maintenance, inspections, and other necessary services related to the motor vehicles and equipment provided to the Contractor by the City. ***This is a requirement on many of our project assignments including several in the metro Atlanta area such as Cobb County and Athens. Because we have numerous vehicles, we have a separate department whose function is to procure these vehicles for our project teams. They also handle all of the required insurance.***
- r) Provide a detailed Motor Vehicle Use and Safety Policy for the use of such vehicles by any staff of the Contractor sufficient to ensure that the City is protected regarding the use of vehicles. City may utilize any vehicle described in section 5.7 of the General Conditions when not in use by the Contractor. ***Jacobs has a well-documented policy for use of vehicles which we will provide for your review and comment. We have provided our NAI***

**Safe Driver Policy plan summary in Section VII (Appendices).**

- s) Obtain approval of the City Manager on vehicle make, model, and age and adhere to required branding to the City of Dunwoody standards of any additional vehicles furnished and used for service delivery by the Contractor. **We will seek approval from the City Manager prior to acquisition and adhere to all branding requirements on vehicles, should they be required.**
- t) Furnish and maintain for the benefit of the City all labor, supervision, and equipment not otherwise provided, which are necessary and proper for performing the services, duties, and responsibilities set forth and contemplated as necessary to maintain the required level of service. **We have reviewed the scope of work provided for the Service Area and have based our proposal on these services as addressed in the specific Service Area scope of work provided later in this section.**
- u) Communicate with the Mayor, City Council, and media services only through the City Manager or designee, unless otherwise authorized. **As a partner to the City Manager we strongly believe in consistent, coordinated, and strategic communications practices for both internal and external audiences. We support the City Manager in all communications activity and will only engage in communications with media and press representatives when given explicit permission to do so by the City manager or designee. We will also hold covenant with the City Manager's permission and/or approvals when it comes to any communications or dialogue with City leadership, including but not limited to the Mayor and the City Council.**
- v) Maintain, for purposes of City business, established business hours and provide appropriate staff to perform any after-hours requirements. Such hours are subject to change throughout the term of the contract. Monthly billing invoices to the City shall include a production report including monthly recap of hours spent on the Contract segregated by on-site and off-site hours and percentage of each staff member's time spent solely on City contracted services. **We will conform to the business hours as established by the City as well as production reporting requirements. Should staff be required to attend meetings or similar activities after business hours, they will.**
- w) Provide the City with a primary contact who shall be available to the City in person or by telephone on a twenty-four (24) hour basis, seven (7) days per week. **Chuck Button, a 39-year veteran in local government services and consulting, will serve as your 24/7 contact for this contract. In addition, the Directors named in the individual scope sections will also be available to answer questions or handle anything that arises at any time of the day or night.**
- x) Use only the address of Dunwoody City Hall and Dunwoody e-mail addresses for all City-related matters, including both incoming and outgoing mail. **We will use the City's mailing address and email address for all City-related matters.**
- y) Prepare and provide to the City update reports submitted monthly and within 48 hours when requested by the City. All reports should document details of any subcontractor's work and the current status of specific performance indicators established for each service area. **We will provide these reports. We can also use additional software so the requested information is available at any time with the click of a button and reflects the latest information. These customized reports can**

**We believe an assignment of this importance requires our most senior commitment, and streamlines the decision making process by empowering our team on-site to work with the City Manager to effectively reach agreement on all issues.**

***be set by the City to reflect information in the system that you want to see on a regular basis.***

- z) Prepare and provide to the City annually (during the budget process), the strategic management plan for continued services in the specific service area managed by the Contractor. ***We will meet with the City Manager and other Departments to jointly develop our portion of the strategic management plan. This will be done in conjunction with the annual Best Practices Workshops to allow any best practices developed elsewhere to be presented to Dunwoody prior to finalizing the strategic management plan.***

aa) Maintain and update at least semi-annually the scope of work, listing specific services to be delivered in the service area managed by the Contractor. ***Chuck and our service area Directors will have regular communication with the City Manager to be sure that the services we are providing meet your needs. We will be proactive in bringing recommendations of other services that we believe would be beneficial to Dunwoody. Throughout our proposal, we have noted ways in which Dunwoody can grow to the next level as a city, and we will continually seek new and innovative ways to apply research and best practices in these areas.***

- bb) Designate an employee responsible for the proper maintenance of all City records in accordance to the City's records retention policy including both archival and destruction. ***Edie Damann will be the Jacobs team representative for all maintenance, upkeep and management of records for the teams interactions with the city in accordance with the details of the city's record retention policy for archival and destruction.***

Please see individual scope item responses in the following sub-sections.

## 2. DELIVERY OF HIGH QUALITY SERVICES

Our proposed organization was designed to allow for a high degree of controls, while allowing flexibility to accommodate varying levels of work. This is accomplished by maintaining a relatively small management organization, supported by diverse local capabilities and capacity required to complete nearly every task identified in your RFP in-house.

Chuck Button will serve as your main point of contact for this contract. Chuck's career of public sector service, with experience as both a County Manager and as Manager of Operations with Jacobs, affirms Chuck's credentials to lead our team. Chuck's position as a senior manager within Jacobs allows him full authority to negotiate and sign all contractual agreements and task orders. The City Manager will have direct access and communication with each of our Service Area Directors. This enables better communications and a stronger partnership to achieve your objectives. Chuck will monitor the Director assignments to ensure our high standard of responsiveness.

**You have organized each work package in a way that exactly mirrors Jacobs' systems for organizing work.**

Each Service Area will be a project within our organization and will have a Director assigned. To insure that each Director has a thorough understanding of the work required within their work package, they were assigned the responsibility for the preparation of the Service Area Scopes of Work requested in the RFP. Each Director then selected their key personnel and worked with them to review and understand the requirements of the RFP. This approach has proven to be very beneficial to our clients. This approach creates "buy-in" by the team on day one of the contract - there is no learning curve.



## AUTHORITY AND AUTONOMY

By dedicating our senior management staff to this assignment, we can expedite the decision making process. Chuck will coordinate with our proposed Directors, **Kim Conroy, PE** (Assistant Director of Public Works), **Donnie Fuller** (Director of Parks and Recreation), and **Bob Mullen** (Director of Public Relations and Marketing), each of whom have a great deal of authority and autonomy. We expect them to operate their service area with their project team as a local independent business with one customer for that project: **you**. The Director leads the project team, and while they have the final responsibility for the service area's success, it is the responsibility of each team member to know their role and what is expected of them.

Should the City Manager determine that additional, out-of-scope work is needed, he will meet with the Director for that service area to review requirements. The Director will then assess with the team what tasks are being requested, hours required, and staff needed to perform the tasks. The Director will then price the additional work using the existing rates in the contract. For smaller assignments, the Director will meet with the City Manager and finalize the value of the change. For larger assignments, the Director will review the change with Chuck. Reviews and approvals will be made within 48 hours of the finalization of the scope change by the City Manager.

We have organized our project teams to focus solely on exceeding the needs of you and your citizens. We hold regularly scheduled administrative reviews to monitor project cost, schedule, and quality performance against the plan and identify and mitigate any risks that arise. Our corporate Project Controls Group implements performance metric tools to enable teams to respond if performance trends are not meeting expectations. These reviews also enable back office team to "reach back" into our global organization for capabilities, best practices, and lessons learned from other similar programs.

Please see the individual scope of work sections following this section for specific methodologies and approaches to each service area.

## 3. COLLABORATION

In order to begin implementing any improvements, we believe it is important to create a foundation of collaboration. Collaboration is first and foremost about communication. We will work with the City to maintain regular and daily communication about the goals and objectives set during the creation of our key performance indicators (KPIs). Using existing technology as well as other internal and external systems, we provide the City of Dunwoody with up-to-the-minute information on the activity in any department, with customized reports. This information provides you with quick, easy, and efficient information about anything going on in the various service areas.

Beyond communication, collaboration is about innovation. We will bring our knowledge and experience providing similar services to our clients in the United States and overseas (principally in the United Kingdom) through our Best Practices Workshops comprised of Jacobs staff located in other parts of the country and the world. This team will meet with your staff and our local staff at least annually to share information and best practices. Additionally, we will constantly research innovations and new and best practices in the field of city management. We can learn from other cities across the country and use that knowledge to grow the City of Dunwoody into a leader in well-run and effective municipal government.

Finally, collaboration is about value. Jacobs has a program for cost-saving expertise called JV+ that gives our Directors access to state-of-the-art cost and time saving practices that have been implemented in our locations around the world. Using the JV+ process in FY2013, we provided \$6 billion of project savings to our clients. We will research this database to identify the right cost-saving approaches to implement at the City of Dunwoody.

Our Directors are expected to operate their Service Area with their project team as a local independent business. While the Director has the final responsibility for the project's success, it is also the responsibility of each team member to constantly innovate to provide cost-saving

or efficiency improvements. We can help you become a highly innovative city while also bringing efficiency improvements and cost-saving opportunities because of our established foundation of collaboration.

**Our entire team is dedicated to helping you run the most innovative city in metro Atlanta!**

#### 4. COMMUNICATION

We pride ourselves on being client-focused and responsive to client requests. All emails, phone calls, and correspondence with the City Manager and City Staff will be addressed by close of business each day. We will maintain a flexible and transparent schedule with the City Manager and Staff so that ready access to key personnel is maintained at all times. Our partnership with you promotes a team commitment and streamlines the decision-making process by empowering us to work with the City Manager to effectively reach agreement on all issues. This local empowerment allows much quicker turnaround.

Our communication and collaboration strategy is centered on the same system we use in our local office. As discussed previously, we have an information system known as PIMS to create customized reports for the City, focused on the needs of each department and perhaps even each manager. These reports can be printed at a moment's notice, with real-time information. This system is one of the keys to effective communication and collaboration. How information is managed and dispersed will be a key factor in effective communication and collaboration and critical to the success of the City's programs. We provide a seamless, collaborative environment for all stakeholders through the use of PIMS. PIMS sits on top of existing software to provide a full featured reporting system, including an executive dashboard, and prevents redundancy and insures that all team members have access to the most accurate information.

To effectively provide the quality of services required, communication must be clear and direct. While PIMS can allow ready access to information in real-time, it

does not replace the need for effective, face-to-face meetings. Joint meetings with the City Manager and the Directors will need to occur regularly, perhaps even daily, to ensure all service areas are coordinating their activities and understand the city's priorities. In addition, each Director will meet with their teams on a weekly basis to ensure each individual is fully informed. We will also meet monthly with every contractor involved with providing services in each service area. Weekly reports from these contractors will be reviewed for progress toward jointly-agreed-upon goals.

#### 5. TRANSITION

We understand that one of your greatest fears would be any drop in customer service if you decide to change contractors for this work.

**We commit that the residents of and visitors to Dunwoody will not notice any difference before, during, and after our proven transition plan is implemented.**

Through the power of partnership, implementing cost-effective solutions, and delivering innovation and responsiveness, we deliver proven results in transitions into complex, service-critical contracts where no disruption in service is of the highest importance. Our extensive experience in this area (**see examples of our previous transition experience on the following page**) has taught us the transition of work from an incumbent contractor requires careful planning and continuous attention to a variety of critical factors to ensure your phase-in objectives are met. Maintaining a safe work environment, ensuring continuity of operations, retaining critical skills, minimizing disruptions to the City of Dunwoody's residents, and effectively dealing with the incumbent and other contractors are key success factors. The success of the phase-in establishes the basis for a productive partnership between the City of Dunwoody and Jacobs, so we are providing seasoned leadership and a phase-in plan developed over many years of experience and lessons learned.

## Jacobs Project Examples of Previous Transition Experience

Contract	Phase-In Period	Personnel Transitioned	Acceptance Rate
Cobb County, Georgia Construction Management	30 days	30 incumbent	97%
Test and Evaluation Contract for NASA White Sands Test Facility	60 days	332 incumbent	99%
Engineering & Science Contract for NASA Johnson Space Center	45 days	1,441 incumbent	90%
Test Operations Contract for NASA Stennis Space Center and Marshall Space Flight Center	45 days	305 incumbent	94%
Research, Operations, Maintenance, and Engineering at NASA's Langley Research Center	60 days	399 incumbent	96.50%
O&M, Information Management, and Test Support at Arnold Engineering Development Center	60 days	2,000+ incumbent	99%
Facility O&M Support for NASA Kennedy Space Center	30 days	94 incumbent	100%

We bring demonstrated success applying our procedures and methodologies to contracts similar in nature, in each case applying lessons learned to continuously improve our process. This successful phase-in experience is summarized in the table below, which shows the actual contract activity, the duration of the phase-in, the number of people transitioned, and the percentage of incumbent personnel who accepted offers if they were made an offer.

### PHASE-IN PLAN

Our Phase-in Plan and methodology aims to minimize any risks of contract changeover and ensure continuity of work on Day One of the contract by maximizing our understanding of the ongoing work, identifying critical milestones, and establishing proper controls to track and report status. We have prepared this contract Phase-In Plan by:

1. Analyzing the data available in your RFP,
2. Applying our experience from previous, similar contracts

We augment this plan with a Phase-In Control Plan that functions as our comprehensive tracking and control plan during contract phase-in.

### PHASE-IN CONTROL PLAN

For your phase-in, we focused on achieving five overarching objectives, each with associated risks that we will mitigate. **These can be seen on the table on the following page.**

The heart of our phase-in procedure is a detailed checklist of actions that must be accomplished to successfully complete contract phase-in. This checklist will be the tracking and control document for the phase-in. Key requirements of the plan include:

- Understanding incumbent interfaces, current and assigned resources, and the personnel currently performing the work
- Documentation of information technology (IT) tools and resources used to accomplish work
- Documentation of staff and skills required for each work element as well as a list of candidates for the positions and the status of each candidate

A staffing chart that provides a list of the staff needed to fulfill each requirement, notes about critical skills and schedule requirements, and a statement of preparedness in terms of required training or certifications will be created. In addition, the plan will cover all identified requirements (milestone and non-milestone). We will brief the Phase-In Control Plan to the City Manager at the beginning of the phase-in. Thereafter, progress on the

## Jacobs Phase-In Methodology

	Objective 1	Objective 2	Objective 3	Objective 4	Objective 5
<b>Objective</b>	Ensure performance is not adversely impacted and minimize incumbent workforce uncertainty during the period from contract award to contract start. We will consciously increase workforce awareness so there are no compromises in performance during phase-in.	Identify all critical personnel hires and ensure a high percentage of our employment offers are accepted.	Objective 3: Ensure that all city operational processes, functional roles and responsibilities, and critical points of contact are fully coordinated and integrated and that any issues that could impact successful continuation of city services on Day One of the contract are fully resolved.	Objective 4: Ensure continuity of work by making certain our phase-in operations are fully operational on Day One of the phase-in.	Objective 5: Ensure all contractual infrastructure is in place and operational on Day One of the contract.
<b>Risk</b>	<i>Unable to Retain Critical Skills</i>	<i>Inability to hire the workforce.</i>	<i>Negative impact to current work activities.</i>	<i>Not fully operational at contract start.</i>	<i>All contract infrastructure not in place.</i>
<b>Mitigation</b>	Early identification and focus on these incumbent positions will be the primary objective of our human resources phase-in team lead. We have been successful in previous phase-ins securing these critical personnel by focusing quickly on them and making offers early in the process. In the rare occasion when these positions cannot be filled by incumbent and/or recruited personnel, we have been able to call on our vast resources to temporarily and sometimes permanently fill these positions.	Our approach of first securing the critical positions and then the rest of the workforce has proven to be extremely effective. While we do not anticipate any problems hiring the workforce, this is still an area of focus as the time period involved to accomplish this is compressed. As with the critical skill positions, we have an effective recruitment process backed by vast corporate resources.	Our communication plan as discussed in Figure 4 has proven to be effective in calming the incumbent workforce concerns. We will be establishing work hours in our phase-in facility to accommodate all employees and make available phase-in personnel after work hours if required.	Our milestones identify all actions required to be fully operational at Day One of the contract. Early analysis of data in the WBS and site walk downs along with employee interviews to validate our understanding of workload is essential. Effective communication with the incumbent contractor, employees, and City officials are also key aspects to help identify all operational requirements as well as any potential risks.	Our Contracts Management Group, being on-site, will facilitate rapid negotiation and completion of all agreements.

plan will be reviewed by key members of the Phase-In Team and briefed to the City Manager on a daily basis.

### PHASE-IN TEAM

Our Phase-In Leader, Chuck Button, is a 39-year veteran of local government services and consulting. We assume that the City Manager will serve as the City's Phase-In Lead to interface directly with Chuck.

Other phase-in team members and their roles include:

- **Christopher Walker, Esq.**, Legal and Contracts Management. Chris is lead attorney for Jacobs' Southeast operations responsible for all contracts and subcontract agreements.
- **Brandon Miller**, Human Resources Director for Jacobs' Southeast region. Brandon will assist in the human resources associated with the transition.
- **Mark Vosburg**, Information Management Systems. Mark is the developer of the Jacobs PIMS system that can provide an overlaying "dashboard" for information for this contract.

This team is fully committed to ensuring a smooth transition during the phase-in period.

## PHASE-IN SCHEDULE AND PERFORMANCE METRICS

**Our master phase-in schedule is provided below. All phase-in activities will be tracked against this schedule. Progress is monitored on a near-real-time basis and briefed to the City Manager.**

In addition, as part of our phase-in planning, we developed an approach to minimize incumbent

workforce disruption that is based on lessons learned from our recent enterprise contract transitions. These concerns and conditions that sometimes cause incumbent workforce consternation include:

- Has the winning contractor bid a smaller staff, placing my job at risk?
- Will the winning contractor cut my base pay or benefits?
- Will I be placed in a different job that I may not like?
- Will I get along with the winning contractor's management team?

We faced these four concerns in all of the 20+ contract phase-ins over the past several years and in each case, our Workforce Communications Plan significantly

## Transition Schedule

Phase-in Activity - Milestone	Contract Awarded (July 2015)	Phase-in Start 12/1/2015	Week 1	Week 2	Week 3	Week 4	Contract Start 1/1/2016
Pre-Contract Announcement Activities							
Milestone 1 - Jacobs/Dunwoody Leadership Interface							
S.A. Mgr, Phase-in Mgr, meet with City to discuss Phase-in Plan			▲				
Site Visit							
Update Phase-in Plan							
Activate Phase-in website			▲				
Milestone 2 - Jacobs/Incumbent Interface							
Meet with incumbent to discuss phase-in/phase-out plan			▲				
Update Phase-in Plan							
Milestone 3 - Mobilize Phase-in Team							
Establish Phase-in Team Location							
Conduct Phase-in Team Orientation							
Complete & Execute Communication Plan							
Phase-in Team Arrives on site			▲				
Conduct Walk-Thru of Facilities/Activities							
Milestone 4 - Hire the Workforce							
Update Staffing Plan, as required							
Meet with City/Incumbent to understand critical hire needs							
Publish Employment Hotline			▲				
Execute Town Hall meetings			▲▲	▲▲			
Interview incumbents and other personnel							
Extend offers							
Obtain signed offer acceptance letters							
Fill from Jacobs Resources as Necessary							
Execute new employee training and on-boarding							
Notify incumbents not selected for retention							
Rebadge Jacobs/City workforce							▲
Milestone 5 - Assume Work Responsibility							
Interface with City leadership and working-level managers							
Refine Phase-in Control Plan							
Ensure on-time delivery of all requirements & deliverables							
Assume accountability including assets/inventory							
Milestone 6 - Hold Readiness Reviews							
Conduct Weekly Milestone Readiness Reviews				▲	▲	▲	▲
Update Phase-in Control Plan							
Coordinate any necessary corrective actions							



diminished them. In our Town Hall meetings and on our phase-in website, we will be open and honest in explaining our proposal. We have developed our benefits plan to be highly competitive. We will not arbitrarily cut salaries; however, we reserve the right to compensate people based on the job they are hired to do rather than on previous salaries, that may be inconsistent with job responsibilities. In all cases, we will work to ensure that the total compensation offered to the incumbent workforce is fair and consistent and competitive with the local markets. We will also explain our intent to hire and place critical incumbent employees where their skills and capabilities are best suited. The Frequently Asked Question (FAQ) section of our phase-in website will elaborate on these, as well as numerous other areas of workforce concern.

Our phase-in website will be finalized and online within 24 hours of contract award. With the incumbent contractor's cooperation and permission, we will mail or send e-mail notification to all incumbent employees to inform them of times, dates, and locations of town hall meetings where they can learn about our phase-in plan and ask questions related to contract changeover. We will not conduct interviews at the town hall meetings but will discuss interview schedules. We know from experience that sharing information is absolutely necessary to maximize morale and personnel retention after contract award.

## INITIAL STAFFING

Our approach to hiring incumbent personnel focuses on meeting the principal needs of these experienced and highly qualified employees. These needs include stability and minimal disruption during phase-in; a compensation and benefit package that is perceived to be comparable to the current package; recognition of qualifications; open and fair equal employment opportunity (EEO) policies; and honest, accurate, and direct communications that define anticipated changes, the reason for those changes, and a realistic implementation plan.

We recognize that the incumbent's experience, job knowledge, and training are vital to our performance.

***Our goal is to fill staffing requirements with incumbent personnel where desired by the City; we will not change what is working.*** Based on our experience during recent contract assumptions, our confidence in the fairness of our compensation plan, our reputation as a quality employer, and the strong indications that existing contractor personnel want to remain in their jobs, we are highly confident in our ability to meet this staffing goal. The few remaining positions will be filled from Jacobs recruiting actions or reach-back to our corporate resources.

Initial orientation for all new Jacobs employees, either incumbent or new hire, will begin as part of in-processing. This briefing will address City policies and procedures, especially those regarding safety, security, and quality standards; corporate policies and procedures, such as time reporting; and our expectations and approaches regarding continuous improvement. Human resources representatives will brief employee benefit plans and assist employees in completing necessary paperwork. Since we desire to use the majority of the incumbent workforce that the City endorses, we will recognize their seniority within the current contractor's staffing plan. We offer competitive salaries and wages and fringe benefits and are confident that they will match with current ones. The human resources representative will work with each individual to ensure comparable offers are provided when they would remain in the identical role that they currently fill.

## COMMUNICATION AND COORDINATION

As noted above, communication with the City Manager will include briefings by our Phase-In Manager. We will also perform Weekly Milestone Readiness Review meetings to ensure all tasks are on track and to take corrective actions if not. Also, as noted earlier, direct communication and coordination with the existing contractor's Phase-Out Manager will occur on day one and daily thereafter. We will use the website as our primary information source for everyone involved, but key phase-in team members will be constantly in touch with our Phase-In Manager to handle critical issues that may arise that are not in the plan.

## INVENTORY

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The inventory task will be conducted by a specialist to be determined as part of the phase-in team. We will start with a database of equipment currently being used by the existing contractor and then work to show change in custody as staff, tasks, and equipment are transitioned. Coordination will be crucial between the current contractor and Jacobs to ensure accuracy and completeness of this process. This topic will be a standing agenda item for meetings between our Phase-In Manager and their Phase-Out Manager. With the "chain-of-custody" approach proposed here, the City is assured all inventory is accounted for, transitioned effectively, and not lost in the process.

## PHASE-OUT PLAN

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Key to the continual success of an operation during contract transition is the cooperation between incoming and out-going contractors. As an in-coming contractor, we would expect cooperation from the incumbent to have access to personnel to ensure the most critical objective, hiring the workforce, is accomplished. Consequently, our underlying principle during phase-out is to provide that cooperation essential for the successful transition to the new contractor. Maintaining our reputation is an important aspect of our phase-out strategy. Major objectives during phase-out transition are as follows.

- **Objective 1:** Making available incumbent personnel to new contractor, while continuing operations without impact.
- **Objective 2:** Establish and maintain effective communication to ensure rapid and effective response to changes.
- **Objective 3:** Disposition and transfer of assets/inventory.
- **Objective 4:** Transfer of records necessary for continuity, including training records and records of fees/fines due to the city.
- **Objective 5:** Identify all vendor agreements that must be established or continued by the new contractor.
- **Objective 6:** Report progress on transfer of phase out actions.

Most of the objectives will be accomplished during the phase-in of the new contractor with the cooperation of our incumbent Service Area Directors with assistance from our corporate offices as necessary. However, some of the activity required during phase-out will require our presence after start of the new contract. We propose a minimum of 30 days for our phase-out team to be available following start of the new contract. Phase-out personnel will consist of corporate resources and incumbent workforce remaining with the company. It has been our experience that the disposition of assets/inventory and transfer of records requires the continued presence and support of the outgoing contractor. At the conclusion of the phase-out period, we will report completion of all objectives to the City Manager.

## 6. FACILITIES, EQUIPMENT, AND SUPPLIES

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Based on our review of the RFP, it appears that Dunwoody is providing all the facilities, equipment, and supplies that we could foresee needing. The one exception to this is PIMS. If selected, we anticipate meeting with the City to review what information systems the City is currently using. We will then provide a demonstration for you to evaluate PIMS.

## 7. ENVIRONMENTAL SUSTAINABILITY

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We noted that the City of Dunwoody earned Gold-level Green Community certification in 2013 from ARC after being recognized as a Silver Green Community in 2011. In order to earn this status, the City made substantive commitments to bettering its community and environment through ordinance enhancements and sustainability policies. You have also done a great deal in terms of educating the residents and employees about these policies to demonstrate its commitment to making Dunwoody a better place to live and to help assure that all City departments follow sustainability policies and procedures that, if followed, improve the value of services provided. In addition, any purchases made and projects undertaken are chosen for lowest life-cycle cost.

We are committed to supporting the City's environmental sustainability goals and will include a multi-level approach that:

- Assures that we understand your sustainability policies and ordinances
- Reinforces compliance with your goal of being a Green Community by enforcing polices and ordinances
- Engages with your Sustainability Commission
- Helps identify new and innovative best practices from peer cities in the region for consideration

For example, as you decide how to develop any newly acquired property or improve upon existing park space, an example of leadership will be to assure that the new space/park results in a no net loss of trees, includes pervious pavements, applies LEED standards for possible structures, and incorporates waste and water use reduction as appropriate. Jacobs has helped other communities develop city center parks or other areas incorporating all of these criteria. Once the space/park is complete, a means of communicating to users the sustainable features should be included. This way the public understands that the City "walks the talk" and is committed to the practices, principles, and ordinances that it created.

In addition, our key staff for Public Works (**Kim Conroy, PE**), Parks and Recreation (**Donald Fuller**), and Public Relations and Marketing (**Bob Mullen**), as applicable, will regularly attend monthly Sustainability Commission meetings. Their attendance demonstrates commitment by these departments, help familiarize them with current thinking and activities, and provide the opportunity for city service areas to participate in the development of new practices and possibly new ordinances. For example, as you evaluate a different approach to solid waste collection and disposal, including curbside recycling and green-waste collection, our staff who have experience in evaluating solid waste management programs may brief the Sustainability Commission and Department of Public Works staff. Your goal to improve service at a better value, lower environmental footprint, and reduce dependence on County-provided services is worthy and should be carefully considered.

Finally, we seek additional ways for you to be recognized for sustainability efforts and achievements. This may be in the form of a project award for a new park or other project, or in terms of applying for and receiving a grant to implement a new program. We have helped other cities and counties receive well-deserved recognition from professional organizations on their public works projects. These awards provide improved visibility, and if information is provided to the residents, a positive reinforcement and sense of pride that comes with the award.

Jacobs was ranked No. 7 for overall green firms in *Engineering News Record's* 2014 Top 100 Green Design Firms survey. Jacobs currently has eight LEED Accredited Professionals or Associates in our Atlanta office, and we are in the process of helping more of our engineers and landscape architects get certified. LEED demonstrates that our staff is familiar with current trends in sustainable development and how to tailor them to fit a public or private client's unique project. In metro Atlanta, we have provided design for the following LEED-certified buildings and projects:

- DeKalb Juvenile Justice Center
- Winship Cancer Institute, Emory University
- North Oxford Road Building and Parking Deck, Emory University
- Riverview Athletic Complex, Pace Academy
- Recreation Activity Center Expansion, Georgia Southern University, winner of the 2008 Outstanding Sports Facility by the National Intramural Recreational Sports Association
- Renovation and Addition for the Georgia Museum of Art, University of Georgia
- Gwinnett Center Parking Deck

Additional Jacobs LEED projects include:

- L-8 Reservoir Pump Station and In-Flow Control Structure, Palm Beach County, FL
- Jacksonville Electric Authority (JEA) Total Water Management Plan, Segment 2 River Crossing, Jacksonville, FL
- O'Hare International Airport Runway 10C-28C and Associated Taxiways, Chicago, IL



- North Carolina State University Gas-Fired Cogeneration Plant, Raleigh, NC
- Kyle Warren Park, Dallas, TX
- Fort Campbell High School, Fort Campbell, KY
- Los Alamitos Army Reserve Center, Los Alamitos, CA
- Ina Road Water Reclamation Facility Upgrade, Tucson, AZ
- King of Prussia Headquarters and Technical Center, King of Prussia, PA
- Tailings and Water Transfer Project, Calvary and Fort McMurray, Alberta, Canada
- University of Pennsylvania - The Wharton School, Steinberg Hall-Dietrich Hall Addition, Philadelphia, PA
- US Army Corps of Engineers, Alaska District, F-22 Recovery, Remediation, and Restoration
- Australia Pacific LNG, Queensland CSG/LNG

## ITEMS PROVIDED TO THE CITY

To meet the requirements of the City, we anticipate providing 4 trucks (3 for Public Works and 1 for Parks and Recreation). For the Alternative Combined Services (Public Works and Parks) we will pool those trucks and resources. Jacobs will provide necessary additional equipment as needed.



Yerkes Neuroscience Research Facility, Emory University



Toco Hills Public Library



# PUBLIC RELATIONS & MARKETING

(RFP) 15-01  
Technical Proposal

## MUNICIPAL GOVERNMENT SERVICES PROCUREMENT



Dunwoody N9

March 27, 2015

# Response to Scope of Work Public Relations & Marketing

## DEPTH

- Communicators and designers familiar with municipal operations
- Resources which extend beyond a single industry and traditional delivery methods
- Complex abilities and innovative approaches for success

## FLEXIBILITY

- Exceptional quality, consistency and efficiency
- Nimble and responsive to changing demands and needs
- Just-in-time, solution-centric ideas

## EXPERIENCE

### Bob Mullen, Director of PR

- 26 years of experience including the last 4 years as the City of Dunwoody's PR and Marketing Director
- Dunwoody resident and passionate community participant
- Skilled in strategic messaging, media relations, event management/planning, advertising, electronic media, marketing collateral, social media, and public engagement

## 1. SERVICE DELIVERY OBJECTIVES, WORK ACTIVITIES, AND DELIVERABLES

Providing proactive, citizen-focused customer service and thoughtful response to the needs, wishes and demands of the community is critical to the success of Dunwoody City Government. The community's trust and confidence in its elected leaders can be significantly damaged by the mere perception of poor customer service. Continuing to build Dunwoody's strong brand, community outreach programs, and attentive relationship building will ensure the city has continued economic success.

For the past four years, Jacobs has provided strategic support, planning, and action-oriented results for the City of Dunwoody. The efforts have helped to solidify the reputation, standing, and community trust the city and its staff require to be seen as an ethical, capable, and responsible governing body.

We are passionate about continuing our mission for the city. **Bob Mullen** and **Edie Damann**, as well as the deep bench of communications professionals, are ready to continue delivering exceptional results to ensure a positive future for the city. Through tireless and extensive proactive communications efforts, we will continue to play an important role as the city further strengthens relationships with the citizens of Dunwoody.

We have a proven record of providing superior media relations, public participation and civic engagement, while also creating timely and consistent information distribution.

Our dedicated team of communications professionals currently providing expertise and guidance for the Public Relations and Marketing services of the city is the most qualified and knowledgeable resource for Dunwoody. Our established relationships, nuanced citizen and community understanding, and depth of capabilities and experience make Jacobs the strategic asset needed to take the city forward for the next four years.

We are a committed and integral part of the city's operations and steadfast in our desire to continue to fulfill all of the requirements and needs as detailed in the city's Request for Proposals (RFP) summary.

## We have the capabilities, the experience, the staff, and the resources to start work for you tomorrow.

### 2.8.1 GENERAL REQUIREMENTS

The Public Relations and Marketing Department maintains clear channels of communications between the citizens of Dunwoody and City Hall. The Department provides materials to the city to promote municipal events, publications, and promotions. In addition, the Department works with media vendors to purchase appropriate radio, TV, and print media and serves as the primary point of contact for all media.

Contractors responding to the Public Relations and Marketing scope of work shall perform the following services:

- 2.8.1.1 Provide services under the direction of the City Manager or designee. **Over the past four years, we successfully worked with Dunwoody City Managers providing expert communications counsel and support. Throughout this time we worked closely with each City Manager and all staff designees and will continue this same strong assistance and cooperation.**
- 2.8.1.2 Provide a Public Relations and Marketing Manager, approved by the city, with full responsibility to manage all Public Relations and Marketing Department staff necessary and proper to perform the services, duties, and responsibilities set forth. The Contractor shall not replace the approved Manager without written approval of the City, which approval will not be unreasonably withheld. **We will continue to provide a full time Public Relations and Marketing Director with full responsibility overseeing and administering all duties and services as outlined. Additionally, we agree Bob Mullen, our Public Relations and Marketing Director, will not be replaced without written approval.**
- 2.8.1.3 Provide the city with a primary contact who shall be available to the city in person or by telephone on a twenty-four (24) hour basis, seven (7) days per week. We agree and will comply. **Bob Mullen, a Dunwoody resident for more than 15 years, will be available to the city in person or by telephone twenty-four (24) hours a day, seven days a week and will supervise all PR and Marketing team members to maintain exceptional quality, consistency and efficiency.**
- 2.8.1.4 Provide supervision of Contractors providing Public Relations and Marketing Services to ensure that Contractor performs contractual requirements effectively and efficiently. **Our current team has worked with more than a dozen different designers, contractors, and vendors to deliver agreed-upon services in an efficient and effective manner. We will continue to provide successful supervision of contractors by conducting pre-, during and post-delivery review with contractors.**
- 2.8.1.5 Verify and update all information provided or obtained from other sources. **We have taken the Public Relations and Marketing services program forward and will verify and update data and information from other sources. Proofing, reviewing and fact-checking, along with analysis and evaluation, are continual efforts.**
- 2.8.1.6 Provide creative design services and product development for city reports including, but not limited to, Accounting, Budgeting, and Police Annual reports (e.g. CAFR, Budget, PAFR, and Police Annual Reports). **We have delivered quality and award-winning creative design and support services for a number of city-created reports. We will continue to work with all city departments to deliver creative design and communications for electronic, printed and presentation reporting.**



2.8.1.7 Track, maintain, and report in a timely manner on key performance indicators established for the Public Relations and Marketing by the City in consultation with the Contractor. ***We have consistently been one of the first, primary department responders in providing accurate and measured key performance indicator data. We will maintain a uniform delivery of performance data through the use of tracking tools and measurement formulas to demonstrate function and execution of the program.***

2.8.1.8 Identify and perform other Public Relations and Marketing responsibilities where the firm reasonably anticipates needs, which are not specifically set forth above. ***We recognize communications, public relations and marketing does not always run "as expected" or homogeneously through all periods. For this reason, we will perform other unanticipated Public Relations and Marketing responsibilities in an on-demand and as needed basis.***

## 2.8.2 PUBLIC RELATIONS

2.8.2.1 Promote City policy, programs, and achievements. Serve as a liaison with residents and other stakeholders as directed by the City Manager. ***Having served as your communications team for the past four years, our team members are expertly familiar with city policy, programs and accomplishments. We delivered proven and measurable results to citizen, resident and stakeholder outreach, and continue to improve the city-citizen relationship. We will continue to pursue positive citizen relationship building through similar programs and initiatives.***

2.8.2.2 Provide the City with an approach and structure on which to build a long-term Civic Engagement Program that integrates into all departments. ***We helped build and install the city's current civic engagement***

***program, complete with a long-term strategic plan, tactics, toolkit, and resources. We will proactively employ focused plans, programs, and efforts to create a fully-evolved and successful public involvement initiative to weave civic engagement opportunities through all departmental activities, projects, and plans.***

2.8.2.3 Maintain and improve a strategic Civic Engagement Program noted above and manage all aspects of the program. ***The practice of municipal civic engagement continues to evolve. We will build on the established foundation through supportive best practices and industry-proven strategies to maintain a long-term, cross-departmental civic engagement program. The innovative efforts already in place will be augmented and improved upon through practice, measurement and analysis to generate public involvement and participation.***

2.8.2.4 Develop an annual, detailed strategic Civic Engagement Plan with a set of practices and tactics, which can be implemented across departments. ***Using the existing City of Dunwoody Civic Engagement Plan (developed by Jacobs) as a base for moving forward, we will augment and improve upon established practices and tactics to promote successful civic engagement practices. The tools and tactics established over the past two and a half years provides us with a distinct advantage of knowing which programs and approaches work best for/with the citizens of Dunwoody.***

<b>The Jacobs Team - Strategic Civic Engagement Activities</b>					
<b>Project</b>	<b>Inform</b>	<b>Consult</b>	<b>Involve</b>	<b>Collaborate</b>	<b>Attendees/Participants</b>
Dunwoody Main Street	✓	✓	✓		30+ businesses
Dunwoody Town Hall & Citizen Connection Meetings	✓	✓	✓		400 + community members 100 + Online participants/ideas
Georgetown Gateway	✓	✓	✓		125+ community members
Brook Run Multi-Use Trail	✓	✓	✓	✓	300+ community members
Project Renaissance parks & Development	✓	✓	✓	✓	150+ community members
New Dog Park	✓	✓	✓	✓	100+ community members
Mount Vernon/ Vermack/Manhasset	✓	✓	✓		125+ community members
City Sidewalk Meetings	✓	✓	✓		50+ community members
Code Rewrite Overview	✓	✓	✓	✓	20+ community members

2.8.2.5 Develop a Civic Engagement Toolkit. **We will leverage internal resources of expert planners and public involvement experts, as well as industry best practices (learned from our team's involvement in organizations such as International City/County Managers Association and the City County Communications and Marketing Association) to update the Dunwoody-specific civic engagement toolkit. See above table.**

2.8.2.6 Provide content for and help update the City's website, which may contain City contact information, statistics, history, departmental and facility descriptions, the City and community calendars, meeting agendas, agenda packages, minutes, City codes, notices, pictures, and multimedia. **Bob and Edie are intimately familiar with the City of Dunwoody's website and the content management system, as our team played a significant role in selecting the web designers, the layout, key functionality, and all content and tools. We have been working to improve all aspects of the site and identifying new methods to increase web traffic. We are adept at performing up-to-the-minute updates and**

**new page development to ensure accurate data, departmental activities, and projects are accessible and available 24-7.**

2.8.2.7 Provide information, with timely updates, and maintain continuous dialog and communication with City residents and citizen groups. **We have been active in continuous communication activities over the past four years and there's no slowing down. Continuous and proactive outreach, education, connections, and involvement are at the core of our communications philosophy. We will utilize a wide variety of communications tools (including website, emails, social media, video, photography and others) to share information with residents and community members.**

2.8.2.8 Engage and communicate with all segments of the community in an effective and inclusionary manner to promote active information sharing and participation. **Over the past five years, we have implemented new and innovative communications and engagement tools and opportunities. From public involvement events to online community engagement**

## City of Dunwoody

### Main Street Project - Communicating Change and Understanding

As the City of Dunwoody moved forward with the implementation of the city adopted Master Plan for Dunwoody Village the infrastructure improvements planned for Dunwoody Village Parkway had received opposition and concern from the local businesses as well as the public. While the project addressed the need for pedestrian improvements along the Parkway, the community was not embracing the improvements and the project was in need of encouragement and support for its success.

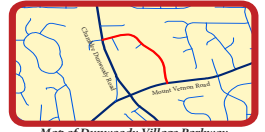
#### DUNWOODY VILLAGE MAINSTREET PROJECT



Addressing Dunwoody Village Parkway was identified as a top priority in the Dunwoody Village Master Plan, as well as the Comprehensive Transportation Plan.

The Dunwoody Village Main Street Project will reconstruct Dunwoody Village Parkway into Main Street, the center piece of the Village with wide sidewalks, street lights, lighting, and benches.

The improvements will be completed along the length of Dunwoody Village Parkway, from its southern terminus at Mount Vernon Road to its intersection with Chamblee Dunwoody Road. Dunwoody Village Parkway is indicated in red on the map at right.



Map of Dunwoody Village Parkway

The Jacobs communications team understood it needed to inform, educate and involve the community as well as local Dunwoody Village businesses to help foster a sense of understanding of the project and the potential quality of life benefits and future economic growth a project like this could cultivate.

To address these concerns, the Jacobs team created a plan to educate, inform and involve Village businesses and residents through compelling marketing materials, visuals and numerous individual meetings to explain and gather questions and concerns on the project. The plan also targeted clarifying several project misconceptions and issues related to perceived traffic and business impacts.

- Conducted 15 in-person briefings with area businesses (May 2013)
- Conducted proactive walk-through briefing/update meetings with village businesses, briefed more than 12 business contacts
- Held Dec 5 Main Street Project Update event at Carbonara for village businesses, attended by a dozen village business representative and media

Through a strategic outreach and marketing program which re-branded the area as Dunwoody's "Main Street" the Jacobs team coordinated a synchronized outreach program to inform village area businesses of the city's plans for Village Parkway project.

Staff developed specialized creative materials including: a project placemat with data, facts and background information; scheduled several in-person meetings and visits with businesses to ask questions of staff and elected officials; several Main Street handouts and in-store cards and posters which businesses could share with customers; a regularly distributed e-mail alert which informed businesses and community members on the project progress, construction and completion; dedicated web page materials with up-to-date news and information on all project timetables and deliverables.

Through these proactive and creative measures the Jacobs team helped to alleviate concerns from local businesses and community members and create a better understanding and acceptance of the project. The efforts helped adjust media coverage and project perceptions from mostly negative to positive comprehension and an improved ability to recognize the city's vision for the area.



*tools, we opened doors for residents, businesses and community members to get closer to the city, understand the vision and programs the city offers, and provide a means to be heard and appreciated. Whether an event, public meeting, email exchange, or phone call, residents can connect with the city and find the information they need in a participatory manner.*

2.8.2.9 Work with media vendors in the purchase of print media, radio, or TV media. Publish studies, reports, and analyses for City staff and public presentation. ***We have demonstrated exemplary knowledge, experience, and relationships with all media outlets and contacts seeking to cover the City of Dunwoody. We will continue working with our media partners to effectively secure placement of messages, advertisements, and promotional materials through the purchase of print and broadcast advertising. In coordination with these purchases, we will provide reports and analyses to ensure advertising and earned media coverage is tracked and measured.***

2.8.2.10 Work in conjunction with all City departments (Police, Human Resources, Finance & Administration, Municipal Courts, Public Works, Community Development, Economic Development, and Parks & Recreation) to develop communication activities that address the concerns and issues of the public, both proactively and as a reaction to unexpected events. ***We have demonstrated the ability to work across all city departments to promote and communicate programs, projects and initiatives to meet their individualized goals and expectations. We work directly with department heads and department staff to acquire important background information critical to fully understanding the requirements for a communications and marketing strategy to achieve success. Special consideration is given to***

*each unique audience and each unique circumstance (based on past experience, community knowledge and involvement) and adjustments are made throughout the process to ensure new responses and tactics address the given situation (See graphic below).*

2.8.2.11 Assist with establishing and maintaining an understanding of what civic engagement is and what it means to Dunwoody residents and City leaders. ***We understand civic engagement is not a one-size-fits-all method of connecting with residents and community members. We work with city staff and elected officials to cooperatively create a program and methodology to define civic engagement for Dunwoody and specific opportunities. The practice of municipal civic engagement continues to evolve and we will build on the established foundation through supportive best practices and industry-proven strategies to maintain a long-term, cross-departmental civic engagement program. We will adapt and evolve the program over time to meet the distinct needs of the community and city leaders.***

2.8.2.12 Coordinate with publishers to produce useful, informative, timely, and attractive publications. ***We have the creative resources and existing relationships with multiple print and publishing vendors to continue creating enlightening and useful print pieces. The pieces produced, including the City Insights overview of KPIs/services, project placemats, brochures and annual reports, are successful examples of well-received print materials. We also recommend expanding print production and outreach through new offerings such as a quarterly city newsletter.***

2.8.2.13 Develop a graphical and thematic design for the City's annual report. Coordinate with graphic designers, photographers, editors, printers and others in the production of the annual report, as needed. ***We produced several city-wide***

## Atlanta Gas Light

### Pipeline Community Outreach - Georgia STRIDE II Program

Phase II of Atlanta Gas Light's Georgia STRIDE (Strategic Infrastructure Development and Enhancement) Program is a continuation of Georgia STRIDE Phase I completed in 2013. The entire program is the company's most extensive infrastructure project to-date. Georgia STRIDE involves construction of large diameter transmission pipelines in communities across the Atlanta Metropolitan area. Given the magnitude of Phase II, and the significant impacts to property owners across the Atlanta area, Atlanta Gas Light again tapped Jacobs' Communications team to continue this effort based on its successful management of Phase I.

#### Significant Challenges

Phase II of Georgia STRIDE includes approximately 50 miles of new pipeline installed in four separate pipeline projects across four counties: Coweta, Forsyth, Hall, and Gwinnett. Significant challenges in Phase II include culturally diverse stakeholders in multiple jurisdictions, construction within close proximity to major highways in heavily populated areas, safety concerns from citizens and elected officials, and rate implications for Atlanta Gas Light customers.

#### An Experienced Process

Jacobs' Communications team revisited the overarching strategic communications plan they developed for Phase I of Georgia STRIDE and enhanced it to reflect the unique needs of Phase II. In addition, Jacobs developed project-specific strategic communication plans for each of the four projects. A tailored communication plan for each project helps to address the diverse needs of each community appropriately. Each plan includes extensive research of each project area with a focus on identifying key stakeholders, potential issues and community concerns. These stakeholders may include but are not limited to schools, churches, businesses, homeowners'/community associations and environmental groups. The plans contain custom community outreach approaches and implementation strategies intended to reduce public concern.



***annual reports and we are highly experienced in graphic design, utilizing professional designers, printers and in-house experts to create award-winning and illuminating thematic pieces. From annual reports to promotional pieces, we will continue to deliver outstanding materials.***

- 2.8.2.14 Document important City events for future use in City developed publications. ***Capturing event-specific and timely photos and videos, we attended and recorded almost all of the key events, meetings and milestones over the past four years. We amassed a database of photos, images, videos and summaries which capture the history and community celebrations. This practice will continue moving forward.***

- 2.8.2.15 Serve as the civic engagement leader to begin coordinating and attending meetings. ***We ushered in the city's civic engagement program and have been at the lead of community and citizen interaction throughout all meetings and events. We will continue to dedicate ideas, resources, and staff to forward the goal of informing and involving residents and community members in the projects, initiatives and programs rolled out by the city and departments.***

- 2.8.2.16 Maintain and promote the City's brand and branding standards. ***Having helped establish and promote the city's brand identity and uphold the brand standards, we will hold steadfast in the role of brand stewards for the city. As PR and marketing experts, we***

*understand communications but we are also adept at brand and visibility management when it comes to outreach initiatives. Your brand touches numerous audiences and stakeholders, and we will provide skillful guidance to maintain and promote your brand.*

2.8.2.17 Post public notices as directed. *We are acutely aware of the importance of issuing public notices in compliance with all city charter, code, state and regulatory requirements for official notices. We will work with all departments and staff to ensure notice posting and distribution happens in an efficient and effectual manner.*

2.8.2.18 Utilize Facebook, Twitter, Flickr, and other social media outlets to post information on the City's activities. *We managed the city's social media presence and activity for the past four years and provided timely and critical information to thousands of its followers. We helped build the city's presence and follower connections through various social media outlets, and will continue to reach greater participation levels moving forward. We are experienced in various communications technology and social media platforms and have first-hand knowledge of community social media outlets (Facebook, Twitter, Flickr, etc.). We will utilize our knowledge of these powerful social media communications tools to market and promote the city's events, meetings, and celebrations. Social media communication will also be strengthened through integration with other media (in advertisements, event listings, articles, etc.).*

2.8.2.19 Serve as liaison between the City and the citizens off Dunwoody. *We developed relationships and inroads between the city and the citizens of Dunwoody that would take other groups years to recreate. Our experience with existing relationships is valuable and deep. We also offer access to our depth of public relations and communications expertise including professional facilitators skilled in managing citizen advisory committees, directing information-gathering charrettes, maintaining continuous dialogue with city residents and citizen groups, posting public notices, Spanish-language translators, demographic researchers, and creative media specialists.*

2.8.2.20 Respond to public and press inquiries as directed by the City Manager. *We have a track-record of responding to all media inquiries within a 24-hour period and will remain committed to meeting that standard. We hold response to citizen inquiries to a high standard, and will remain constant as a source for timely and meaningful information. We will assist in responding to all public and press inquiries as directed by the City Manager and city staff, and develop appropriate messages and materials to promote efficient, timely, and appropriate responses.*

2.8.2.21 Produce and distribute the quarterly City newsletter (online version) as directed by the City Manager. *We will continue our exemplary work with the City Manager and staff on the production of meaningful and valuable city news and information. We established an effective and informative weekly e-news alert which reaches more than 11,500 residents and community members. As previously stated, we recommend publishing a printed quarterly newsletter, and will work to create future news pieces to best meet the needs of the community.*

2.8.2.22 Coordinate research and baseline/ongoing measurement to help establish annual program direction and set strategies for implementation activities. ***We established a set of measurement guidelines to gauge the effectiveness and direction of our program activities. The measures (including online traffic, followers and subscribers, “like”, “share” and click-thru rates, meeting attendees and event participants, and other data-driven tracking) help to continually inform and help guide the strategy and activities for the annual communications program. Coupled with a bi-annual citizen survey, we regularly take the pulse of the community to help stay out in front of needs and issues and create meaningful opportunities for future, beneficial public engagement and involvement.***

2.8.2.23 Document all public relations procedures and processes as well as perform tests and walk-through’s to ensure sound public relations procedures and processes. ***We preform pre-activity and post-activity planning, analysis, and documentation to help fuel the practices, strategies and tactics the team employs. This provides ongoing analysis and study to ensure best practices are employed, creating highly successful and effective activities. We will continue to document and plan all public relations procedures and processes that safeguard sound and valuable public relations.***

2.8.2.24 Work with City Manager and staff to determine annual program goals. ***Each year our team members and internal staff meet to establish goals, objectives and plans for the public relations and marketing activities for Dunwoody. We will work directly with the City Manager and staff to discuss and analyze the benefits and value for these goals and objectives and collectively chart an agreed-upon course for the year.***

2.8.2.25 Communicate and interact with council members and City department heads to secure insight and buy-in on civic engagement goals, outreach needs and activities. ***Working with the City Manager and city staff, we successfully launched the city’s first civic engagement program, which successfully brought public involvement and participation to new levels within Dunwoody. We will continue these activities and will interact with Council Members and staff to ensure a strategic civic engagement program plan is established and served. We will also provide quarterly plan implementation and measurement updates to the City Manager, staff, and City Council to help refine, improve, augment, or analyze program efforts and results.***

2.8.2.26 Support marketing with promoting and informing the public regarding citywide events. ***For the past four years as the lead of the public relations and marketing efforts, we provided sound and successful promotion of city events, celebrations and meetings. We will continue collecting staff and department input to create exciting events and will use creative resources to promote attendance, and participation for future city-wide events. We will promote and publicize events through local media resources, online outlets, bloggers and influencers, and social media.***

2.8.2.27 Research current and relevant trends and benchmarks that might have an impact on the City and provide communication on the events’ impact(s) to the City. ***Our team members are actively involved in many industry and professional organizations and association which provide the team with access to best practices and municipal peers in groups such as City/County Communications and Marketing Association, the International City/County Management Association, Georgia Municipal Association Public Information Officers group, Emerging Government***



## City of Johns Creek

### Strategic Guidance for Communications Complex Issues

The City of Johns Creek was setting a new strategic direction and seeking to establish a stronger commercial tax base is essential to serve as the engine that generates revenue from new and diverse sources to support service levels in neighborhoods across the entire community.

The Jacobs communications team provided senior staff for the City of Johns Creek during the transition between their departing Communications Director and a new hire. In this role, Jacobs worked in close coordination with the Mayor and City Manager as well as other senior city staff in developing a Strategic Communications Plan for the Mayor's initiative deemed "The District."

Jacobs was tasked with crafting all messaging from the myriad of complex issues associated with the effort, as well as all strategies and tactics to implement the communications program. Jacobs was instrumental in developing a path forward and work plan for City communications staff to undertake as part of the planning and preparation for the annual event. Activities included social media, community events, publications, staff training, and more.

In preparation for the City of Johns Creek's eighth annual State of City Address Mayor Mike Bodker was seeking a way to communicate a complex set of issues in a way that would both inform and entertain.

Jacobs also supported the State of the City event including the Mayor's speech, a video highlighting The District, and other aspects of this high visibility event.

The State of the City address was welcomed by attendees and served to connect with the community to better explain the impact of "The District" on Johns Creek's competitive identity.



***Leaders, and the public Relations Society of America. Our active involvement provides intelligence, access and information on trends and benchmarks related to the performance and success of the municipal government communications program. We are also involved in speaking and participating in various municipal government conferences and webinars that keep us up to date on current and relevant trends within municipal government communications.***

2.8.2.28 Establish a set of evaluation and data capture measurement guidelines as well as a measurement capture template/grid. ***We established a set of measurement guidelines and goals to gauge the effectiveness and direction of our program activities. We will continue to implement data gathering measures and evaluate all criteria to ensure consistent high-level performance and successful program management.***



2.8.2.29 Identify and perform other public relations responsibilities where the firm reasonably anticipates needs, which are not specifically set forth above. ***We recognize public relations begins with a solid foundation of understanding of how to communicate with and respond to various “publics” and audiences. While all of the details of a successful public relations plan aren’t always captured as issues, needs and unforeseen matters arise through the course of a year. We are nimble, and experienced to handle all communications and public relations requirements that may occur during service. Our public relations management activities will be planned, documented, and tested to verify all procedures and process identify and mitigate for any risks or issues that may present themselves through the course of the year. By anticipating needs and implementing program efficiencies, we help avoid challenges before they arise and ensure sound public relations procedures. This includes staying abreast of industry trends and best practices to promote efficient communications and public interaction.***

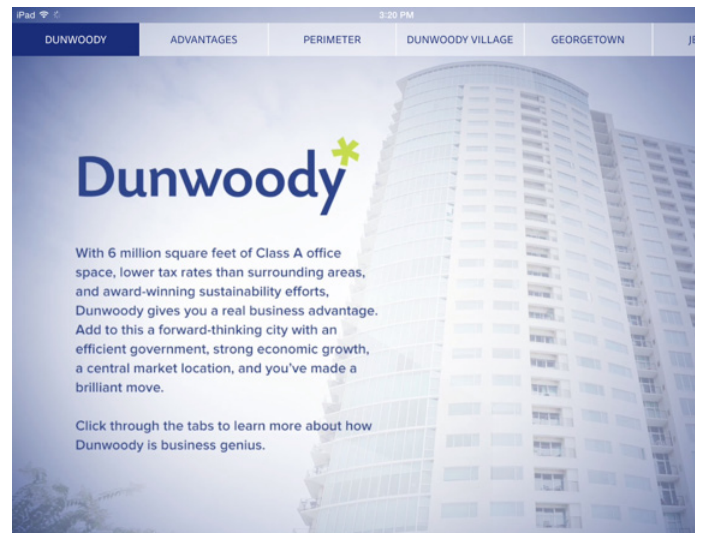
***in the materials created to help highlight the value of the community. Presentation and promotional materials we help create will be graphically appealing, timely and include a call to action so audiences may begin to engage and build relationships with city leaders. Because new business established in the city is a measurable metric, we will track its growth as we work together to promote the city and attract prospective business and residents.***

2.8.3.2 Work in conjunction with the economic development staff to produce materials to assist in attracting prospective business leaders to the community. ***We will continue to provide tools and materials which highlight the opportunities in Dunwoody and connect with business community targets and decision makers on the value of the community and the atmosphere for business. By working in conjunction with the city’s economic development staff, and following marketing strategies laid out in the annual plan, we will promote the city as a leading destination for prospective businesses, regional business leaders and as a geographic hub for events.***

## 2.8.3 MARKETING SERVICES

The Contractor shall provide the following services:

2.8.3.1 Prepare presentations to highlight the value of the community as well as too promote it too business, while tracking the percent of new business brought into the City of Dunwoody. ***We have extensive experience in marketing and selling the benefits and value of the Dunwoody community and the city itself. We worked closely with the city Manager and the economic development department to promote and market Dunwoody as a destination for businesses and executives. The team also works to help capture, summarize and promote results of the city’s business growth and retention. Enhancing the knowledge-based economy of the area, our efforts to support the City’s staff are evident***



***The above image is a screenshot taken from the newly created 2015 Dunwoody Economic Development Toolkit, co-developed by the Jacobs Team and the City Department of Economic Development***

2.8.3.3 Support public relations with promoting and informing the public regarding, citywide events. ***For the past four years as the lead of the public relations and marketing efforts, we provided sound and successful promotion of city events, celebrations and meetings. We will continue to work in conjunction with all public relations activities, collecting staff and department input to create exciting events and use creative resources and ideas to promote attendance, involvement and participation for all future city-wide events. We will promote and publicize events through local media resources, online outlets, bloggers and influencers, and via social media.***

2.8.3.4 Promote the City's sponsored programs and events. ***We bring extensive experience promoting, marketing, publicizing and staffing city-sponsored programs and events and have been the primary driver for outreach and planning for the past four years. Dunwoody is not only an exciting place to live and work but it is also alive with activity. We will continue to promote the city's events and happenings through multiple media and marketing outlets and through integrated marketing efforts (unifying PR, advertising, branding, signage, etc.). In promotion of city sponsored programs and events, we will use proven and effective techniques to reach target audiences and participants while tracking and measuring these outreach efforts to determine successful methods for future marketing and communications activities. Part of this effort also involves accurately capturing images, feedback, participation and record keeping for use in future marketing materials and campaigns.***

2.8.3.5 Create annual marketing plan, which outlines the approach and specific projects that will be undertaken. ***We established an annual marketing plan for the past four years which institutes guidelines and goals for the effectiveness and direction of its marketing program activities. Additionally, we perform marketing planning, analysis and documentation to help fuel the practices, strategies and tactics employed by the marketing team. We provide a continued analysis and study to ensure best practices are employed, creating highly successful and effective marketing activities. We will uphold this practice of creating an annual marketing plan and continue to document and plan all marketing procedures and processes that preserve successful and measurable marketing efforts. This annual marketing plan is a living document that will be refined and strengthened through ongoing impact measurement and tracking as well as consistent documentation and reporting. The plan will include our ideas and creative designs for marketing the city via print and broadcast media outlets. We will help create effective marketing procedures and processes that will support the city's brand and maintain its positive perception. We will help identify ideas and develop campaigns that touch on all aspects of marketing the city, anticipating needs and providing brand-enhancing benefits well into the future.***

2.8.3.6 Document important City events for future use in City developed publications. ***With an advanced expertise in capturing event-specific and timely photos and videos, we attended and recorded almost all of the key events, meetings, and milestones over the past four years. We amassed a database of photos, images, videos, and summaries which captures the history and celebrations the city and community.***

2.8.3.7 Design media for use in print, radio, or TV. ***Our team, supported by creative media and design specialists within the company as well as contractors and vendors, will provide compelling, attractive and informative materials for use across multiple mediums and outlets, including but not limited to print, radio, television, and online media. These materials will be tied into the overall brand direction and will employ consistent messaging, design themes and content to promote a cohesive program and delivery.***

2.8.3.8 Document all marketing procedures and processes as well as perform tests and walk-through's to ensure sound marketing procedures and processes. ***Similar to our public relations procedures and processes, we perform pre-activity and post-activity planning an analysis and documentation to help fuel the practices, strategies and tactics which the team employs. This provides a continued analysis and study to ensure best marketing practices are employed, creating highly successful and effective activities. The team will uphold this practice and continue to document and plan all marketing procedures and processes that safeguard sound and valuable results.***

2.8.3.9 Maintain and promote the City's brand. ***Being an engaged and attentive brand steward is part of the team's overall services support strategy. Having helped establish and promote the city's brand identity and uphold the brand standards, members of our team will hold steadfast in the role of brand stewards for the city. As PR and marketing experts, we understand communications***

***but we are also adept at brand and visibility management when it comes to outreach initiatives. Your brand touches numerous audiences and stakeholders, and we will provide skillful guidance to maintain and promote the Dunwoody brand.***

2.8.3.10 Identify and perform other marketing responsibilities where the firm reasonably anticipates needs, which are not specifically set forth above. ***We are passionate about marketing and public relations activities. We understand what it takes to develop and communicate a brand. After all, a brand is more than a logo and a tagline. An effective brand, backed by a strategic and results-oriented marketing program speaks to audiences and helps to establish and reinforce emotions and feelings associated with an entity. As expert marketers, we will help you develop your brand to not only promote the quality of life and character of the city but to also help define the true essence of what the City of Dunwoody means to residents, businesses, visitors and leaders.***

***We understand you are still working to solidify understanding and acceptance of your long-term vision and identity. With a newly appointed City Manager, it will be important to further the process of establishing a unique culture and strong brand. We will work with city leaders and stakeholders and uphold the true brand of the city by establishing annual marketing plans that outline the goals, strategies, and tactics necessary to promote and communicate the real heart of Dunwoody.***



## 2. APPROACH AND METHODOLOGY

For the past four years, **Bob Mullen** has served as a trusted partner, strategic advisor, and communications lead. We have been out front and in the trenches, handling issues and proactively consulting through challenging, and at times contentious, public matters and circumstances. From the beginning, we have served the city and worked with the City Manager and staff to deliver sound messaging, promotion, media relations, design and graphic support and cohesive communications to citizens, businesses and community members. We are prepared to continue this partnership to create effective and clear communications while continually implementing opportunities for enhancement. Our communications team serves as a critical hub for linking citizens with the operational and promotional heart of the city in an efficient and effective manner. We provide an unmatched caliber of experienced and talented public relations and marketing expertise, emphasizing creative citizens-focused communication and mining intelligence to assist smart, informed decision making.

has design skills, community knowledge, social media proficiency, and special event knowhow and has been invaluable and consistently deployed for great success.

### A COMMITMENT TO CITIZEN-FOCUSED COMMUNICATIONS

The Dunwoody community has unique personalities, traits, histories and behaviors that distinctively understand. Over the past four years of managing the PR and Marketing team, we provide citizens with information about city operations and achievements is meaningful, relevant and related directly to the city's credibility. We focus our expert communication strategists on the unique needs of municipalities and public agencies seeking to connect with residents and community members, while meeting the expectations of public officials. This in-depth understanding helps guide you through an array of citizen-focused communications activities. This broad range of experience guides our approach to communications and maximizes our ability to produce citizen focused content that is pertinent and applicable.

We also have the results to back that up. We delivered success for Dunwoody across a number of different measurable, including:

- Doubling the amount of the city's e-news subscriber data base to today's level of 11,500+
- Planning and hosting more than 100 community meetings
- Launching a successful "Government 101" program in with 75+ graduates
- Fielding more than 570 media inquiries since beginning of 2012
- Publishing more than 190 content pieces since beginning of 2012
- Bringing in more than 3,250 people to public meetings and events in 2014

Our approach includes initiating web-based surveys and focus groups to track citizen interest in various topics and types of content. We drive action-oriented communications and provides a clear understanding of what citizens want to know – finding the optimum balance of content to meet your need to connect with the community.

### DUNWOODY-SPECIFIC EXPERIENCE AND TALENT

We know Dunwoody. We understand what it takes to deliver superior municipal communications service and are attuned to the needs and desires of your citizens. We not only present you with a world-class team of communication professionals but bring a familiarity and first-hand knowledge which others cannot equal. Our mix of communication experts is unique in the industry, combining "best in class" public relations agency experience with real-world local government communications. The strength of our team starts at the top. Bob Mullen brings more than 26 years of experience from some of the most recognized PR firms in the business as well as municipal government communications expertise and intimate familiarity with Dunwoody. He built global agency network teams, managed client programs across international and domestic borders, and defined and implemented strategies based on the latest government and business trends. A resident of Dunwoody, Bob shares the vision of citizens seeking the highest standards from a local government that they can call their own. **Edie Damann**, the city's Public Relations and Marketing Manager since incorporation,

## BUILDING RELATIONSHIPS

We use various methods of intelligence gathering and input collection to properly gain insight into what affects citizens on a daily basis. We understand the critical need for a municipal communications team to understand and track citizen sentiment. With this knowledge we effectively collect and distribute timely information from across the broad range of departments and services. The communications team is professionally experienced in relationship building tactics to gauge and analyze public attitudes, which create meaningful and deep community relations and public involvement.

We will work within all of these principles to promote consistency, creativity, and acute prioritization of your communication needs. We continue our progress and success, staying in lockstep with the city's strategic long term vision. We will proactively keep the city out in front of issues, situations, or opportunities where we can help build understanding among citizens while reinforcing the city's commitment to service.

### 3. COLLABORATION

We offer strong existing relationships with city staff and department heads, and have worked seamlessly across all departments to create exceptional public relations and marketing opportunities. Our firsthand experience in Dunwoody provides us with a foundation of knowledge and a set of best practices to bring about efficiencies and cost savings. As we have demonstrated on similar communication programs, our approach produces streamlined results that lead to the right balance of staffing and cost savings that can be significant. We are able to achieve this successfully because the Jacobs team provides:

- **Local Government Communications Talent.** We not only know Dunwoody, we are keenly aware of the kind of nuanced communication expected by residents and community members, and valued by elected and public officials. Our experience produces immediate efficiencies because we have been there, proactively moving the needle, eliminating time and resources necessary for any learning curve of other

communication firms who may know public relations, but don't understand the unique needs of citizen focused communication.

- **Deep Bench of Jacobs Resources.** Our team also comprised of designers, engineers, translators, facilitators, videographers, writers, graphic designers, and more are your disposal with just a call or email. A wide variety of cost savings can be achieved by eliminating the need to locate and secure the services of multiple vendors for these types of specialized skills.
- **Agile, Nimble, and Responsive.** We are poised and flexible to meet a variety of needs. Our approach is highly efficient because we know how to extract and translate the right information from across multiple departments and sources to produce quality, relevant and timely communications to citizens and community members. Through our knowledge and relationships, we reduce time and resources spent in data gathering and focus instead on communication output.
- **Inspired and Inventive.** We bring a wide variety of tools and communications vehicles to work with us every day. Using web-based tools, social media, video, and electronic channels creates tremendous efficiencies by eliminating the need for expensive production and delivery costs. We will take these tools to an even greater level of cost-efficiency in your communications arsenal.

### 4. COMMUNICATION

Having led the PR and Marketing department for the past four years, we are adept at coordination of accurate and suitable communications and messaging. Our approach is based on conveying the facts while accurately and cooperatively determining which message and vehicle will best represent the interests of the city. Timely response and proactive outreach is critical to keep you and your leaders informed, on message, and out in front of issues or challenges. We intend to continue working closely with the City Manager and city staff to establish open communications channels and procedures to ensure timely responsiveness.



We promote a partnership to solidly uphold a unified decision making process which enables the team to work with the City Manager to effectively craft appropriate messaging on all issues. We understand that being in city hall, poised and ready, allows much quicker turn around, giving us unique insight into the program by living the issues and by working side by side with the city's staff on a day-to-day basis.

We intend to continue working closely with the City Manager and staff through regular weekly meetings to ensure we are on-target with communications outreach as well as properly planning for future strategic opportunities. We will maintain an active and open relationship with all city staff to promote cross-department coordination of activities and proactively address the city's priorities and needs. We will regularly meet with staff to understand all angles of projects and programs so we may together effectively communicate and collaborate on solutions and plans. The team will also conduct periodic analysis and refinement of key performance indicators to certify we remain on target with goals and objectives, which will promote the success and achievements of the city.

## 5. TRANSITION

Please see our full transition description in the general scope of services section.

## 6. FIRM-SUPPLIED FACILITIES, EQUIPMENT, AND SUPPLIES

We will supply two web-enabled smartphones to support 24/7 availability and access.

## 7. ENVIRONMENTAL SUSTAINABILITY

We know the importance of environmental sustainability and pledge continued support of your programs and efforts as a sustainable organization. We assisted the city with messaging and recognition for previous sustainable efforts and promoted visibility of the City of Dunwoody's recent Gold-level Green Community certification in 2013 from the Atlanta Regional Commission as well as the Silver Green Community certification received in 2011. We will continue to fully support the City of Dunwoody's commitment to conserving and investing in the reduction and protection of the community's natural resources.

Jacobs has long shared these ideals and has integrated sustainability measures, which may help you promote further savings and future practices. As a partner in all communications activities, we will employ daily practices and measures to reduce the environmental footprint of the city and promote policies and procedures to advance sustainability goals and a commitment to the environment.

## SECTION IV

Proposed Personnel

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### MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

SECTION IV  
Proposed Personnel

Dunwoody N9

## SECTION IV

## Proposed Personnel



## 1. STAFFING METHODOLOGY

## DEPTH

- 67 years of engineering expertise, providing clients with high quality services
- Over 400 local personnel in all areas of engineering and planning

## FLEXIBILITY

- Our 70,000 employees allow us to provide you with a wide range of services
- Our personnel are available 24/7, nights, and weekends

## EXPERIENCE

- Our proposed Directors have more than 70 years of combined experience.
- **Kim Conroy, PE**, our proposed Assistant Public Works Director, previously served for 29 years with the Gwinnett County Department of Transportation.
- Our proposed PR and Marketing Director **Bob Mullen**, has served you in that capacity for the last four years.
- **Donald Fuller**, our proposed Parks and Recreation Manager and Director, helped found Gwinnett County's Parks and Recreation Department serving as Recreation Manager.

Our team offers the ability to deliver the most efficient level of staffing and the most appropriately qualified personnel to meet all project requirements. The team we have proposed, together with the home office support and depth of "back office" enable us to provide the level of "Dial-up, Dial-down" capability necessary to meet every project requirement at the minimum cost to you. Our staffing team is well equipped to recruit as needed if a technical skill is lacking in our existing staff. We have invested extensive resources in developing programs and relationships that allow each of our professional staff members to advance to their highest technical capabilities. As part of this program, we will carefully establish an appropriate mix of senior and junior level personnel for each project and task.

## Jacobs' Retention and Succession Program

**Promotion and Retention of Key Project Personnel.** We developed specific plans to promote a positive and enthusiastic environment among the current key staff and maintain project continuity.

**Formal Succession Plan.** Appropriate succession planning fosters solid team relationships, helps maintain a high sense of urgency, and promotes a more open environment for the sharing of lessons learned. It also allows us to always provide you with a vibrant and enthusiastic team eager to face new challenges. Our phased succession planning allows for a period of transition between the outgoing and incoming staff, and is best done near the end of each phase, with the new personnel learning the project during the completion of the current phase, and assuming responsibility for the follow-on phase work.

**Early Plan Development.** We will start planning early and reassess often to allow for an orderly and planned promotion and succession, not forced succession through project fatigue.

**Target Existing Project Personnel for Project Promotion.** By promoting effective project team members we are able to extend the period under which our staff view the project as a career enhancing opportunity, thereby enhancing overall motivation and project performance.

**Training to Encourage Promotion** – Upward promotion will be encouraged through a combination of formal project-specific training programs taught by senior Project Management and continuous, on-the-job training.

## 2. STAFF'S QUALIFICATIONS AND EXPERIENCE

### CHUCK BUTTON, PRIMARY POINT OF CONTACT

Chuck served as County Manager for Gwinnett County in the 1980s and 1990s, then the fastest growing county in the country (more than 100,000+ population), doubling in size. Prior to his service in Gwinnett, he served as both a City Manager and County Administrator in the Midwest. During his tenure in Gwinnett the population exceeded 400,000 with an annual capital and operational budget exceeding \$500 million and employed over 3,000. Gwinnett County was a full-service organization supplying all the county services as well as traditional municipal services. The County took on many issues to meet the growing demands of its citizenry. In this role, he was responsible for implementation of the concept of community/customer service throughout the organization and supervised extensive public involvement. He also led the reorganization of the County to improve efficiency and cultivation of relationships among other local governmental agencies to more effectively provide services.

### KIM CONROY, PE, ASSISTANT PUBLIC WORKS DIRECTOR

Kim is a registered Professional Engineer with over 29 years of previous transportation management experience during his time at Gwinnett County — a major suburb of the City of Atlanta with a population of 840,000 — where he served as County Department of Transportation Director, Chief Engineer, and Division Director for Road Construction and Maintenance among other important roles. Throughout his career he has managed most aspects of transportation during a period of explosive growth in a very diverse county, and has played an integral part in the development and completion of \$1.2 billion of projects funded with local money.

### DONALD FULLER, PARKS AND RECREATION DIRECTOR

Donald brings valued perspective and experience to your Parks and Recreation Department with his knowledge and involvement in construction administration and observation as it relates to park development. He has been involved with numerous park renovation/development projects and offers knowledge of programming and managing various park programs, as well as thorough knowledge of park construction and general construction management and observation. Donald formerly served with the Gwinnett County Parks and Recreation Department and started when the department's services only extended to the militia voting district and subsequently expanded to include the entire county. The County grew exponentially in the following years and the parks and recreation department expanded to meet the increasing demand. The department grew beyond just "parks" to include botanical gardens, golf courses, historic structures, greenways and trails — all of which needed programs, maintenance schedules, and design development. Donald was an integral component to the development and success of Gwinnett County Parks (now known as Community Services). Gwinnett Parks are award winning and highly praised throughout the country as being well maintained and designed.

### BOB MULLEN, PUBLIC RELATIONS AND MARKETING DIRECTOR

A highly experienced marketing, communications, and public relations practitioner with more than 26 years of experience, Bob has served as a senior consultant for major brands and businesses across the globe. Skilled in internal and external communications management, Bob has assisted in the development of strategic brand messaging platforms to guide communications, advertising, direct marketing, internet and public relations activities for public and privately held companies, as well as nonprofits and start-ups. As a senior leader for several full-service advertising and marketing agencies he has guided marketing, public relations and communications initiatives by working directly with corporate decision makers to help define, guide, and promote a strategic vision across multiple target audiences.

### 3. RESUMES

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Please see the resumes for key personnel at the end of this section.

### 4. TRAINING

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We have staff development programs that include in-house training presented by inside and outside subject matter experts. Our staff also attends conferences to continue their education and present the latest advancements in their field. All this training is captured in our Learning Management System which is connected to each employee's Human Resources Information System. Annually, each employee and their supervisor meet to plan the next year's training for the employee taking into account the work assignments planned for that employee. We will take the information developed for each employee and prepare an annual comprehensive training plan for presentation to Dunwoody.

### 5. HIGH-LEVEL ORGANIZATIONAL CHARTS

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Please see our proposed organizational charts for each service area sub-sections following this section. We have included charts for Public Works, Parks and Recreation, Public Relations and Marketing, and an alternative combined chart for Public Works and Parks and Recreation.



## Education

M.S., Political Science/Public Administration, Iowa State University

B.S., Business Administration, Central Michigan University

## Years of Experience

41

## Years with Jacobs

18

## Affiliations

Gwinnett Clean & Beautiful Executive Committee

Gwinnett United Way Board and Past Chairman

Past Chair of Leadership Gwinnett Steering Committee and on the Board of Trustees

Council Quality Growth Executive Committee

Executive Board Member of Gwinnett Chamber

Board member of Gwinnett Redevelopment Board

Full member of ICMA

Past member of ICMA International Committee

Past Vice-president of Iowa Managers Association

Past panel member for the NLC and Institute of Government Affairs training sessions

## Awards

Public Service Award Gwinnett Chamber, 2015

Volunteer of the Year for Gwinnett Clean & Beautiful (2003)

## Chuck Button

### Primary Point of Contact for the City of Dunwoody

With more than 41 years of experience, Chuck has served as an Executive Manager/Senior Project Manager for Jacobs since 1996. He possesses extensive experience working for municipal clients including the City of Dunwoody. He previously served as County Manager for Gwinnett County in the 1980s and 1990s, then the fastest growing county in the country (more than 100,000+ population), with a population of 400,000. Gwinnett County is recognized by ICMA as a council manager community. It is a full service organization supplying all traditional municipal services, including water and sewer.

While managing Gwinnett County and a capital and operational budget exceeding \$500 million and 3,000 employees, Chuck consolidated 32 county departments into seven. In this role, he was responsible for implementation of the concept of community/customer service throughout the organization and supervised extensive public involvement. He also led the reorganization of the County to improve efficiency and cultivation of relationships among other local governmental agencies to more effectively provide services. He also:

- Coordinated the management review of several large construction projects that were brought in on time and budget.
- Managed under intense media coverage.
- Provided governmental services through privatization and outsourcing alternatives.
- Created a vision for the organization by using strategic planning techniques to solidify elected, staff and community priorities.

### Capital Improvements:

- Funded, coordinated, and constructed a \$37 million County Jail, \$120 million road projects, \$50 million water/wastewater projects, \$30 million Civic Center, \$4 million Historical Courthouse renovation, \$70 million Justice & Administration Center, and a \$27 million airport.
- Established timetables and implemented additional sewer capacity.
- Funded and constructed eight new libraries and seven new parks and purchased four new fire station sites and a golf course.
- Implemented a dual computer platform system bringing on line court, financial, personnel, and other management systems.
- Developed and implemented GIS.

### Economic and Cultural Developments:

- Funded and implemented a comprehensive property reassessment system.
- Revamped tree, sign, and development ordinances.
- Studied the feasibility of extending mass transit to the County and implementing the subsequent community vote on fixed rail.
- Instituted a 5-year comprehensive land-use update revolving around water/wastewater availability.
- Developed a County-wide curbside Recycling Program.
- Created a public/private organization to coordinate Human Resource funding.
- Established a Human Relations Commission and staffing.
- Negotiated the acceptance of two tracts of land: an 83+ acre estate valued at \$6 million and 50 acres of commercial property for the civic and cultural facilities valued at \$10 million.
- Eliminated state-imposed wastewater moratoriums and established budgets and rates to meet future utility needs.
- Instituted an agreement allowing the Arts Council to build a multimillion-dollar structure adjoining the County Civic Center.

## Previous Experience

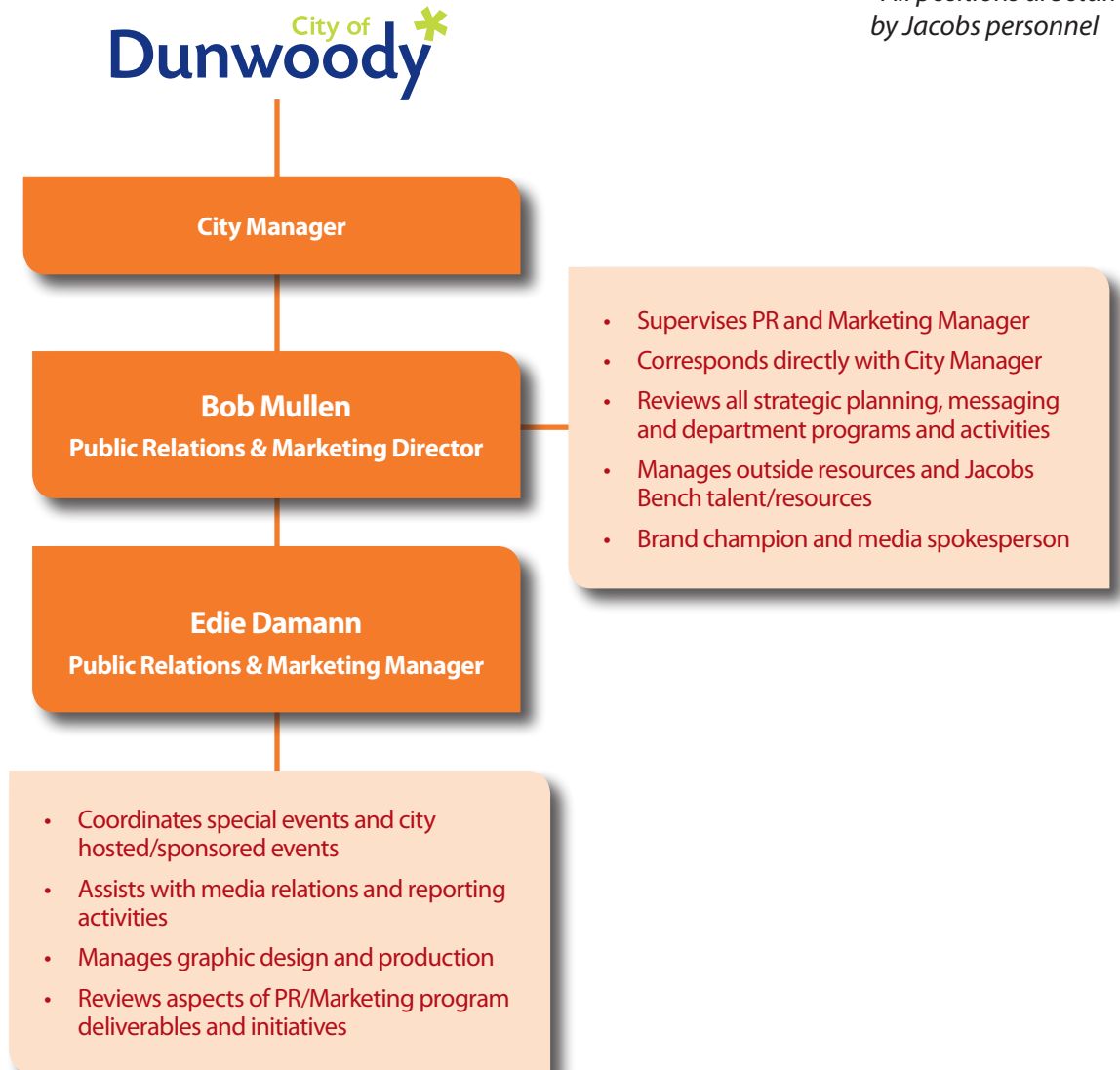
As the former COO and principal for JJG, Chuck had a direct responsibility for accounting, human resources, facilities, fleet, and information technology. He was also responsible for the overall financial and personnel aspects which entails managing resources of \$75+ million and overseeing personnel issues of over 600 employees. During his 15-year tenure at the company, revenues and personnel numbers grew threefold.

## Management Experience

- Coordinated an ownership buyout in management transition.
- Facilitated company growth in which revenues tripled.
- Supervised major relocation to new facility.
- In local government implemented the concept of community/customer service throughout the organization.
- Reorganized large government to improve efficiency
- Coordinated management review of several large construction projects that were brought in on time and budget
- Cultivated relationships among other local governmental agencies to more effectively provide services
- Managed under intense media coverage
- Provided governmental services through privatization and outsourcing alternatives
- Created a vision for the organization by using strategic planning techniques to solidify elected staff and community priorities
- Maintained contact with key clients, including Gwinnett and Fulton Counties.

# Public Relations and Marketing Organizational Chart

*\*All positions are staffed  
by Jacobs personnel*



## Education

B.A., Broadcast Communications,  
Marquette University

## Years of Experience

26

## Years with Jacobs

6

## Affiliations

International City/County  
Management Association

City-County Communications &  
Marketing Association

Georgia Municipal Public  
Information Officer Group

Leadership DeKalb (2013)

DeKalb Communicators &  
Public Information Officers

Public Relations Society of  
America

Technology Association of  
Georgia

Society for Marketing  
Professional Services

## Publications

Georgia Municipal Association  
(Annual Conference) May, 2014:  
Social Media for Local Elected  
Officials; *"What is Social  
Media? What Have Local  
Governments Been Doing  
With Social Media?"*

Georgia Leadership Forum  
(Governing Magazine)  
May 2014: Connections:  
*Engaging Citizens &  
Empowering the Public  
Workforce*

Association of County  
Commissioners of Georgia  
(Annual Conference) April 2014:  
Transparency in Government:  
A course in the Citizen  
Engagement specialty track

Georgia City-County  
Management Association  
(Spring Conference) March  
2014: Transparency in  
Government: Best Practices  
and Overview of Georgia's  
Sunshine Laws

## Bob Mullen

### Public Relations and Marketing Director

Bob is a dynamic team leader and communications professional possessing more than 26 years of experience in providing expert counsel for all aspects of communications, public outreach and involvement, program implementation, and change management, including messaging, public relations, crisis communications, community relations, civic engagement and employee communications. For the last three years he has served as Director of Marketing and Public Relations as part of Jacobs' Municipal Services Contract for the City of Dunwoody where he has directed all communications, civic engagement, and public relations and outreach on behalf of the City and serves as the primary point of contact for all media, civic/citizen engagement, and marketing activities.

### Relevant Project Experience

#### City of Dunwoody, Director of Marketing and Public Relations (Municipal Services Contract), Dunwoody, GA. (Jan. 2011 – present)

- Directs all communications, civic engagement, public relations and outreach on behalf of the city and serves as the primary point of contact for all media, civic/citizen engagement and marketing activities. Works directly with the City Manager, city department heads and elected officials on messaging, communications, public outreach, civic engagement and media relations activities.
- Supervises the communications team and all aspects of city marketing and public relations services to promote beneficial understanding and recognition of city services, projects and activities and ensure accurate, timely and succinct communications and stories are conveyed to both residents and the community at large
- Manages an active and results-oriented civic engagement and public involvement program aimed at bringing citizens accurate and transparent information on all city projects and programs
- Develops communications and collateral materials across all city departments to promote citizen understanding and help inform, tell stories, explain projects, change behaviors and promote engagement and involvement from the community
- Oversees all written materials including all press releases, web content, social media outreach and campaigns, advertising, municipal projects and reports
- Directs integrated communications activities for city department teams to ensure information sharing activities involve and empower citizens in decision making and participation in the development of local comprehensive plans
- Oversees creative design and direction of all communications and marketing materials and serves as brand steward to safeguard consistency of message and design
- Manages social media engines and activities of the city through strategic message placement and utilization of electronic platforms such as Twitter, Facebook, Flickr, Pinterest and YouTube
- Leads and supports consensus building efforts regarding internal program administration and policy decision initiatives to address public needs and uphold master planning directives
- Coordinates well-placed and creative communications to successfully reach target audiences via effective tools such as website, social media, video campaigns, weekly e-news alert and online public engagement portal (responsible for increased outreach and communications to double subscriber base over a 12-month period)

### Previous Project Experience

#### MarCom Group, Senior Public Information Specialist, Georgia (April 2009 – Present)

- Directs centralized southeast corporate marketing communications department including working closely with senior leadership team to create and implement a unified and compelling marketing communications strategy in support of the company's overall visibility, image in the marketplace, and ensure message alignment with the annual corporate business plan.
- Develops annual MarCom Management Plan to identify and exploit opportunities to build and maintain visibility and awareness of firm across targeted stakeholder segments

- Collaborates with service area, regional, and practice area business development leadership to provide strategic guidance of well integrated corporate marketing communication programs, and partnership in supporting the overall corporate image and messages
- Oversees development of all public corporate materials (i.e. corporate brochures, corporate magazine, paid advertising, sponsorships and exhibits, annual reports, presentations, press releases, public statements and speeches, web/digital/multimedia content, etc.) including writing, editing, design, production, distribution
- Identifies, tracks and reports key metrics to validate the relevance and business impact of marketing communications programs
- Maintains responsibility for compiling budget information for company-wide spending on corporate marketing communications, and updates budget to reflect expenditures
- Identifies and prepares executives for external presentations and media interviews and serves as a resource for presentations and speech preparation
- Provides counsel to senior leadership on crisis communications and issues management
- Serves as the liaison where necessary to employee communications, investor relations activities, and proposal marketing efforts to ensure consistency with corporate marketing communications programs
- Manages company presence at conferences and external corporate events and oversees PR activities in support of corporate marketing communication goals

**Brand Resources Group, Atlanta, GA. Vice President/Managing Director (March 2003 – Dec. 2008)**

- Senior supervisory communications consultant responsible for management of all client messaging, marketing, communications and public relations strategy and planning resulting in award winning program delivery and execution.
- Primary client business and communications strategist for global companies and Fortune 1000 corporations; leading resource for communicating new programs, products and change management strategies to internal and external constituencies.
- Responsible for directing all aspects of change management communications including strategic guidance for message content, delivery, consistency, timing and measurement
- Results-oriented management of client executives and marketing teams to communicate leading solutions, offerings and platforms, ultimately driving action and promoting market differentiation.
- Key member of the agency leadership team and contributor to the growth and stability of the agency business realized through industry-leading client and employee retention.
- Directed and cultivated client programs to generate growth, achieve measurable targets and goals, secure future projects, partnerships and strategic account development.
- Multi-disciplinary experience across numerous industries and markets, including technology, logistics, manufacturing, automotive, energy, chemicals, finance and retail.
- Directed communications account planning and strategic program development for clients including NCR, Georgia-Pacific, The Facility Group, Rubbermaid, Toyo Tire & Rubber, Ltd., Dixie, Bobby Dodd Institute, American Association of Occupational Health Nurses and the Association of Fundraising Professionals.
- Participated as key agency manager implementing and recommending hiring, technology and client management processes and account team structure.

**Porter Novelli Public Relations, Atlanta, GA. Vice President – Corporate Communications (May 1997 – Dec. 2002)**

- Directed the Porter Novelli Atlanta Consumer & Corporate Communications and served as a key contributor to the senior management team; helped build and establish the Atlanta office of Porter Novelli in 1997 and helped guide the agency to a top ten ranking within four years of formation.
- Defined and influenced client strategy using relevant market and business trends, creative program ideas and successful tactical message delivery methods that increased media coverage of companies and products and audience penetration.
- Managed \$1 million+ client programs across international and domestic borders, built global agency network teams, created and used agency-wide resources to deliver superior results.
- Directed account planning and strategic program development for clients including Philips Consumer Electronics, Hughes Network Systems, Data General, Nextel, Heidelberg, Shell Chemicals, Spencer Stuart and Mirant.
- Developed client service standards and instituted program tracking and measurement methodologies used as agency-wide tools to ensure consistent, effective client relations.
- Achieved program and plan objectives within agreed upon financial and resource structures, contributing to company growth against the backdrop of adverse business environments.



## Education

M.A., Integrated Marketing Communication, West Virginia University

B.A., Journalism/Advertising, University of Georgia

## Training

G.A.C.E. – Marketing Education I & II, passed

## Affiliations

3CMA Member

PRSA Atlanta Member

National Association of Professional Women Member

## Software

Microsoft Office, Adobe Creative Suite, Final Cut Pro, GovDelivery, Google Analytics, e-mail, social media, Sitefinity CMS, Constant Contact

## Awards

City of Dunwoody Innovation Award, 2012

City of Dunwoody Extra Effort Award, 2010, 2011, 2012

## Years of Experience

10

## Years with Jacobs

3

## Edith Damann

### Public Relations and Marketing Manager

Edie has more than 10 years of professional public relations and marketing communications experience. She is dedicated to the highest level of client service. Her most recent assignment includes serving as Public Relations and Marketing Manager to the City of Dunwoody as part of Jacobs' ongoing Municipal Services Contract. In that capacity she has served as project manager for integrated marketing development and implementation; monitors and approves all uses of city logo and brand materials; and develops and implements marketing, public relations, promotional, and advertising plans among many other duties for the City.

### Relevant Project Experience

#### City of Dunwoody, Municipal Government Services, Dunwoody, GA.

**Public Relations and Marketing Manager (Jan 2011 – ongoing).** Under Jacobs' ongoing Municipal Services contract for the City of Dunwoody Edie has performed the following duties:

- Project manager for integrated marketing development and implementation
- Monitors and approves all uses of city logo and brand materials
- Develops and implements marketing, public relations, promotional and advertising plans
- Oversees all marketing campaigns and implementations for each city department
- Manages all projects commissioned to outside advertising agency
- Responsible for direct communication content included in newsletters, press releases, city website, electronic communications, speeches, scripts, responses, and related materials for public information purposes
- Monitors internal and external marketing trends and news coverage and assists with strategic responses given by city staff and elected and appointed officials
- Implements and monitors city use of social media including GovDelivery, Twitter, Facebook, YouTube, Flickr, Pinterest, See Click Fix, and other electronic city initiatives
- Plans and executes city and community events
- Serves as media contact for the city
- Provides media training to staff and council
- Designs and lays out city annual reports, flyers, mailers, advertisements, and promotional pieces
- Manages educational initiatives including the annual Government101 program
- Represents city at community meetings and events
- Prepares and monitors the marketing department budget
- Creates and oversees marketing department procurement documents
- Presenter, 2013 Mayors Day Conference, "Social Media and Government"
- Presenter, 2014 AWWA National Conference, "Social Media for Public Utilities"

#### TransactionTree, Atlanta, GA. Marketing Manager (July 2008 – Jan. 2010)

- Researched, developed, and coordinated marketing campaigns for online, interactive media, and print publications
- Worked with marketing team members on brand imaging, product line development, and go-to-market campaign
- Created annual marketing plan and budget for product launch and market integration
- Oversaw internship program

- Identified target markets, research competition, managed product launch, and ongoing product implementations
- Developed content for direct mail, telesales, field sales, media advertising, tradeshow, and website
- Reported on program metrics and web-based analytics to track marketing initiatives
- Oversaw special departmental projects as needed including photo/video shoots, press releases, and community focus groups
- Planned and coordinated company participation in National Retail Federation trade show

**Linger Longer Communities: Achasta, Dahlonaga, GA. Marketing and Member Events Coordinator (June 2006 – Feb. 2009)**

- Coordinated all logistical aspects of Achasta's local sponsorship and trade show programs
- Coordinated sales weekends, publicity events, member events, and community outreach
- Assisted with implementation of on-site marketing including point-of-purchase, sales office, Discovery Center, and area-wide billboard displays and graphics
- Served as on-site liaison between Achasta Sales Department and Linger Longer Development Company Marketing Department in production of collateral, website content, and other marketing materials
- Designed, wrote, and edited the Achasta Newsletter
- Served as feature writer for Linger Longer Magazine
- Served as on-site planner and contact for development photo/video shoots and media
- Assisted with location marketing fulfillment responsibilities including direct mail, sales kits, and media kits
- Researched and executed local media buys
- Developed and managed marketing and membership operations budget as well as cottage department budget
- Managed short term villa rental program for public and real estate packages
- Supervised newly implemented Property Ambassador Program

**Wild Bill's Atlanta, Duluth, GA. Marketing and Event Coordinator (Oct. 2005 – April 2007)**

- Wrote and edited press releases, pitch letters, press materials, and marketing communication pieces
- Pitched story angles to local and national media, print, radio, and television
- Wrote web copy and design advertisements for company web site
- Ordered, approved, and coordinated local radio and print advertisements
- Coordinated and organized events on and off venue including concerts, private events, local business and trade shows, and off site promotions
- Worked in conjunction with artists' publicist and media relations departments to coordinate concert advertising for television, radio, retail, and print
- Worked with local radio station promotion departments to coordinate ticket promotions and meet and greet opportunities
- Worked with local businesses to create and maintain marketing opportunities increasing reach and recognition for the venue
- Advanced show dates for with artists' tour management
- Created and maintained venue event calendars, media contact and pitch lists
- Trained and managed street team/gorilla marketing team for venue

**Internships**

Spaulding Communications, Decatur, GA. Public Relations and Marketing Assistant (Feb. 2005 – Oct. 2005)

The Spizman Agency, LLC, Atlanta, GA. Assistant Account Executive (Aug. 2004 – Dec. 2004)

## SECTION V

References

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### MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

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# References

The following is a list of at least three current and pertinent professional references that the City of Dunwoody can contact in relation to Jacobs' qualifications, past performance on similar work, financial stability, and experience.

## REFERENCES

### **Communications, Marketing, and Public Relations Municipal Government Services**

#### **Contract, City of Dunwoody, GA**

Jacobs is providing communications, marketing, and public relations services as part of municipal government services to the City of Dunwoody. The Communications, Marketing, and Public Relations contract covers all City communications programs, media relations and public relations activities; all reports and official City reporting for the office of the City Manager and the Police Department; all electronic communications including website, social media, video and newsletter design, content and distribution; and graphics, maps, pictures and other publications.

**Period of Performance:** January 2012 – ongoing

**Reference Contact/Client:** Warren Hutmacher (now City Manager for City of Johns Creek), tel: 678.512.3200, email: [warren.hutmacher@johnscreekgga.gov](mailto:warren.hutmacher@johnscreekgga.gov)

#### **Municipal Government Services Contract, City of Sandy Springs, GA**

Jacobs is providing municipal courts and parks and recreation management services as part of the municipal government services contract for the City of Sandy Springs. The Courts contract covers all work elements within Sandy Springs Municipal Court Services including court administration, recordkeeping, reporting, staffing, fee collections, calendars, and outside agency communications. The Parks and Recreation contract covers all Parks and Recreation Department management, recreation programming and system management, and park maintenance.

Jacobs has been a valuable partner since the City transitioned from one primary provider of General Government Services to five providers. As the manager of the City's Parks and Recreation department, Jacobs has successfully implemented efficiencies and strict cost supervision practices which have provided the City with expert service offerings for its park facilities and recreation programs. In addition, Jacobs has brought the court advantageous management of all compliance, monitoring, record keeping, and customer service. The successful balance of team expertise and results-oriented work being done by Jacobs is indicative of the quality of service and financially sound management that we can perform for the City of Dunwoody.

**Period of Performance:** 2006 – ongoing

**Reference Contact/Client:** Ronnie Young, Park and Recreation Director, tel: 770.206.2034, email: [ronnie.young@sandyspringsgo.org](mailto:ronnie.young@sandyspringsgo.org)

## Professional Planning and Engineering Consultant Services, City of Chamblee, GA

The City of Chamblee serves an estimated population of 27,500, and it includes approximately 7.6 square miles of area within its boundaries. The City has relied upon private contractors to handle the day-to-day operations of its Development Department for many years, but Jacobs was awarded this contract in 2013. Since then Jacobs has provided a full range of planning and engineering services including conducting the functions of planning, zoning administration, plan review permitting and other related tasks.

Jacobs provides four full-time professional staff, including a Director, Senior Planner, Planning Technician, and Receptionist, and two part-time staff including a Deputy Director and Inspector. In addition, Jacobs provides on-call engineering and landscape architecture services to help process permitting activity.

**Period of Performance:** 2013 – ongoing

**Reference Contact/Client:** Marc Johnson, City Manager, tel: 770.996.5026, email: [mjohnson@chamblega.com](mailto:mjohnson@chamblega.com)

## Parks and Recreation Program, Gwinnett County, GA

Gwinnett County voters have passed four Special Purpose Local Option Sales Tax (SPLOST) since 1996, and the money collected funds parks, public safety, and transportation projects. The Parks and Recreation Program will have received over \$444 million from the SPLOST(s) over a 17-year period.

Jacobs was selected by the County for three consecutive five-year contracts and one four-year contract to provide Program Management services for existing park renovation or redevelopment, and new park design and construction. Program Management services include both pre-construction and construction phase assistance, with particular emphasis on environmental and aesthetic sensitivity in design and execution of the projects.

**Period of Performance:** 1997 – ongoing

**Reference Contact/Client:** Grant Guess, Division Director for Parks and Recreation Project Administration, tel: 770.822.8855, email: [grant.buess@gwinnettcountry.com](mailto:grant.buess@gwinnettcountry.com)

## Capital Improvements Program Management Services, Athens-Clarke County, GA

With over \$250 million dollars of capital improvements to be done in a six-year period, the Athens-Clarke County Unified Government retained Jacobs, acting as extension of staff, to provide Master Planning Consulting Engineer services. Jacobs provided a full range of services, including service delivery planning, engineering design development, program management, project management, bidding, construction administration, and resident inspection for all the projects within the County's overall \$372-million Capital Improvement Plan.

The CIP included simultaneous expansion of all three wastewater plants from 18 MGD to 28 MGD; the continued expansion of their water treatment plant from 28 MGD to 36 MGD; erection of three new elevated storage tanks and rehabilitation of their existing four elevated storage tanks; construction of over 54 miles of new and expanded sewer lines (ranging up to 54 inches in diameter); and 17 miles of new water lines.

**Period of Performance:** 2006 – ongoing

**Reference Contact/Client:** Alan Reddish, City/County Manager, tel: 706.613.3020, email: [alan.reddish@Athensclarkecounty.com](mailto:alan.reddish@Athensclarkecounty.com)



**Roswell Municipal Court Services, City of Roswell, GA**

The City of Roswell faced many challenges running its courts system including improper implementation of court procedures, cases improperly inputted into computer systems, and citizen's dissatisfaction with the courts' customer service. As a result, City management entered into a contract with Jacobs to run its court operations.

**Period of Performance:** 2013 – ongoing

**Reference Contact/Client:** Michael Ficher, Assistant City Manager, tel: 770.594.6190, email: [mficher@roswellgov.com](mailto:mficher@roswellgov.com)

**Bear Creek Water Treatment and Transmission Facilities Operations and Maintenance Services, Upper Oconee Basin Water Authority, Bogart, GA**

Jacobs worked closely with a group of clients that formed the Upper Oconee Basin Water Authority to provide regional water supply solutions for an area of Georgia that was experiencing repeated shortages of surface water supply.

This consortium selected Jacobs to develop the original water supply management plan that included an analysis of multiple water supply options; a pumped-storage system on the Middle Oconee River was selected with a dam on Bear Creek. This pumped-storage configuration allowed for maximum yield from a small reservoir site. Jacobs provides full contract operations and maintenance services for the UOBWA including facility operations and maintenance staff, regulatory compliance sampling, treatment process optimizing, wetlands monitoring and management, watershed management, reservoir water quality monitoring and management, predictive and preventive maintenance programs, and reservoir impoundment dam monitoring and management.

**Period of Performance:** 1998 – ongoing

**Reference Contact/Client:** Melvin Davis, Chairman, tel: 706.769.5120, email: [mdavis@oconee.ga.us](mailto:mdavis@oconee.ga.us)

## CLIENT LIST

Jacobs has thousands of clients at any given time. The table on the following pages merely list a sampling of our local and regional clients we have performed similar services for in the recent past. Additional clients can be provided upon request.

Client	Description of Services
City of Atlanta	Public Works
Gwinnett County Department of Water Resources	Public Works
Unified Government of Athens-Clarke County	Public Works
Douglasville-Douglas County Water and Sewer Authority	Public Works
City of Gainesville (GA) Public Water Utilities Department	Public Works
Columbus Water Works Board of Water Commissioners	Public Works
Cobb County Water System	Public Works
Athens-Clarke County	Public Works
Fulton County Department of Public Works	Public Works
Upper Oconee Basin Water Authority (Oconee, Barrow, Jackson Counties)	Public Works
Cobb County-Marietta Water Authority	Public Works
City of St. Marys	Public Works
City of Alpharetta	Parks and Recreation
Gwinnett County	Parks and Recreation
City of Suwanee	Parks and Recreation
City of Duluth	Parks and Recreation
City of Sandy Springs	Parks and Recreation
DeLong and Associates, Atlanta	Parks and Recreation
AGL Resources, GA	Public Relations and Marketing
Douglasville-Douglas County Water and Sewer Authority	Public Relations and Marketing
Douglasville-Douglas County	Public Relations and Marketing
Etowah Water and Sewer Authority, Dawsonville	Public Relations and Marketing
Fulton County Department of Public Works	Public Relations and Marketing
Georgia Regional Transportation Authority	Public Relations and Marketing
Gwinnett County Department of Water Resources	Public Relations and Marketing
Cobb County-Marietta Water Authority	Public Relations and Marketing
City of Canton, GA	Public Relations and Marketing
City of Cartersville Public Works Department	Public Relations and Marketing

## SECTION VI

Required Forms

(RFP) 15-01  
Technical Proposal

### MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

Dunwoody N9

**5 PROPOSAL FORM****PROPOSAL FORM  
CITY OF DUNWOODY, GA  
RFP 15-01 MUNICIPAL GOVERNMENT SERVICES PROCUREMENT**

The undersigned, as Bidder, hereby declares that this Proposal is in all respects fair and submitted in good faith without collusion or fraud. Bidder represents and warrants to the City that: (i) except as may be disclosed in writing to the City with its Proposal, no officer, employee or agent of the City has any interest, either directly or indirectly, in the business of the Bidder, and that no such person shall have any such interest at any time during the term of the Contract should it be awarded the Contract; and (ii) no gift, gratuity, promise, favor or anything else of value has been given or will be given to any employee or official of the City in connection with the submission of this Proposal or the City's evaluation or consideration thereof.

The Bidder further represents that it has examined or investigated the site conditions if necessary, and informed itself fully in regard to all conditions pertaining to the place where the work is to be done; that it has examined the Contract Documents and has read all Addendum(s) furnished by the City prior to the opening of the Proposals, as acknowledged below, and that it has otherwise fully informed itself regarding the nature, extent, scope and details of the services to be furnished under the Contract.

The Bidder agrees, if this Proposal is accepted, to enter into the written Contract with the City in the form of Contract below (RFP 15-01 properly completed in accordance with said Proposal Documents), and the Contract Documents for RFP 15-01 Municipal Government Services Procurement, at the City of Dunwoody, and to furnish the prescribed evidence of a valid business license, insurance, and all other documents required by these Contract Documents. The Bidder further agrees to commence work and to perform the work specified herein within the time limits set forth in the Contract Documents, which time limits Bidder acknowledges are reasonable.

The undersigned further agrees that, in the case of failure or refusal on its part to execute the said contract, provide evidence of specified insurance, a copy of a valid business or occupational license and all other documents required by these Contract Documents within ten (10) business days after being provided with Notice of Intent to Award the contract (or such earlier time as may be stated elsewhere in these Proposal Documents), the Proposal award may be offered by the City to the next ranked Bidder, or the city may re-advertise for Proposals, and in either case the City shall have the right to recover from the Bidder the City's costs and damages including, without limitation, attorney's fees, to the same extent that the City could recover its costs and expenses from the Bidder under section 6.10 of the Instructions to Bidder if the Bidder withdrew or attempted to withdraw its Proposal.

The Bidder further agrees, if it fails to complete the scope of work according to the provisions within the scheduled time or any authorized extension thereof, that the City may deduct damages from the Contract price otherwise payable to the Bidder.

Acknowledgement is hereby made of the following Addendum(s) received since issuance of the Contract Documents (identified by number)

Addendum No.	Date	Addendum No.	Date	Addendum No.	Date
1	March 12, 2015				

It shall be the responsibility of each Bidder to visit the City Purchasing Department's website to determine if the City issued addendum(s) and, if so, to obtain such addendum(s). Failure to acknowledge an addendum above shall not relieve the Bidder from its obligation to comply with the provisions of the addendum(s) not acknowledged above.

Work, excluding transitional requirements, is to commence on or about January 1, 2016.

The City of Dunwoody requires pricing to remain firm for the duration of the term of the contract. Failure to hold firm pricing for the term of the contract will be sufficient cause for the City to declare bid non-responsive.

Company Name: Jacobs Engineering Group Inc.

Termination for Cause: The City may terminate this agreement for cause upon ten days prior written notice to the Consultant of the Consultant's default in the performance of any term of this agreement. Such termination shall be without prejudice to any of the City's rights or remedies by law.

Termination for Convenience: The City may terminate this agreement for its convenience at any time upon 30 days written notice to the Consultant. In the event of the City's termination of this agreement for convenience, the Consultant will be paid for those services actually performed. Partially completed performance of the agreement will be compensated based upon a signed statement of completion to be submitted by the Consultant, which shall itemize each element of performance.

Termination for fund appropriation: The City may unilaterally terminate this Agreement due to a lack of funding at any time by written notice to the Consultant. In the event of the City's termination of this Agreement for fund appropriation, the Consultant will be paid for those services actually performed. Partially completed performance of the Agreement will be compensated based upon a signed statement of completion to be submitted by the Service Provider, which shall itemize each element of performance.

The Contractor agrees to provide all work to complete the project described in this document for the amount listed in the Cost Proposal (submitted in a separate package).

Legal Business Name Jacobs Engineering Group Inc.

Federal Tax ID 95-4081636

Address Ten 10th Street NW Suite 1400 Atlanta, GA 30309

Does your company currently have a location within the City of Dunwoody?

Yes ☐ No ☒



REQUEST FOR PROPOSALS (RFP) 15-01  
MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

Will your company accept the City's procurement card for payments from the City of Dunwoody?

Yes ☒ No ☐

\* Providing no additional cost is incurred.

Representative Signature 

Printed Name Thomas J. Meinhart, Vice President

Telephone Number 678.333.0184

Fax Number 770.455.7391

Email Address tom.meinhart@jacobs.com

## Appendix B - Affidavit

### Verifying Status for City Public Benefit Application

By executing this affidavit under oath, as an applicant for a City of Dunwoody, Georgia Business License or Occupation Tax Certificate, Alcohol License, Taxi Permit or other public benefit as referenced in O.C.G.A. Section 50-36-1, I am stating the following with respect to my application for a City of Dunwoody, Business License or Georgia Occupational Tax Certificate, Alcohol License, Taxi Permit or other public benefit (circle one) for Jacobs Engineering Group Inc..

[Name of natural person applying on behalf of individual, business, corporation, partnership, or other private entity]

1) ☒ I am a United States citizen

OR

2) ☐ I am a legal permanent resident 18 years of age or older or I am an otherwise qualified alien or non-immigrant under the Federal Immigration and Nationality Act 18 years of age or older and lawfully present in the United States.\*

In making the above representation under oath, I understand that any person who knowingly and willfully makes a false, fictitious, or fraudulent statement or representation in an affidavit shall be guilty of a violation of Code Section 16-10-20 of the Official Code of Georgia.

Signature of Applicant:      Date

Thomas J. Meinhart      3/26/15

Printed Name:

Thomas J. Meinhart, Vice President

SUBSCRIBED AND SWORN  
BEFORE ME ON THIS THE

26<sup>th</sup> DAY OF March, 2015

\*

\_\_\_\_\_  
Alien Registration number for non-citizens

Notary Public James Womack  
My Commission Expires:



\*Note: O.C.G.A. § 50-36-1(e)(2) requires that aliens under the federal Immigration and Nationality Act, Title 8 U.S.C., as amended, provide their alien registration number. Because legal permanent residents are included in, the federal definition of "alien", legal permanent residents must also provide their alien registration number. Qualified aliens that do not have an alien registration number may supply another identifying number below:

## SECTION VII

### Appendices

(RFP) 15-01  
Technical Proposal

## MUNICIPAL GOVERNMENT SERVICES PROCUREMENT

SECTION VII  
Appendices

Dunwoody N9

# Appendices

## EXCEPTIONS TO THE RFP

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We have reviewed the RFP and the proposed General Conditions and find them to be generally acceptable as the basis for the negotiation of a mutually-agreed-to contract between the parties. However, we have the following comments concerning the terms and conditions:

### 1. Insurance

---

Contractor's insurance programs have been long established and cannot be changed. As such, Contractor will carry the deductibles and/or self-insurance limits that are part of the Contractor's global business strategy. Insurance coverage will not extend to any advisory or voluntary groups that are not official offices of the City. The City will be named as additional insured to the extent of Contractor's negligence performance of its services only. Contractor shall provide notice of any potential cancellation of its insurance policies in accordance with the terms of such policy which do include a 30 day notice provision. However, due to changes in the insurance industry, the certificate of insurance will not contain a statement specifying the actual notice period as requested.

## INSURANCE CERTIFICATIONS

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Please find attached to this section Jacobs' Insurance Certifications.

## JACOBS NORTH AMERICAN INFRASTRUCTURE SAFE DRIVER POLICY

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A summarization of our Safe Driver Policy, referenced in Section III, is included at the end of this section.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YY) #11.  
03/05/2015

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 LIC #0437153 1-212-948-1306 Marsh Risk & Insurance Services CIRTS_Support@internal.jacobs.com 777 S. Figueroa Street  Los Angeles, CA 90017-5822 Fax to: 1-212-948-1306		CONTACT NAME: PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL ADDRESS: PRODUCER CUSTOMER ID #:	
INSURED Jacobs Engineering Group Inc.  155 North Lake Avenue, 9th Floor  Pasadena, CA 91101		INSURER(S) AFFORDING COVERAGE INSURER A: ACE AMER INS CO 22667 INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

**COVERAGES**

CERTIFICATE NUMBER: 43212256

REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	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"/> CONTRACTUAL LIABILITY  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC		HDO G25529030	07/01/14	07/01/15	EACH OCCURRENCE \$ 6,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 250,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 6,000,000 GENERAL AGGREGATE \$ 7,000,000 PRODUCTS - COMP/OP AGG \$ 7,000,000 \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS		ISA H08635651	07/01/14	07/01/15	COMBINED SINGLE LIMIT (Ea accident) \$ 6,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE  DEDUCTIBLE RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$ \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N	WCU C47888335 (LA, OH, TX) SCF C47888293 (WI) WLR C47888281 (AOS)	07/01/14 07/01/14 07/01/14	07/01/15 07/01/15 07/01/15	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 6,000,000 E.L. DISEASE - EA EMPLOYEE \$ 6,000,000 E.L. DISEASE - POLICY LIMIT \$ 6,000,000
A	PROFESSIONAL LIABILITY "CLAIMS MADE"	N/A	EON G21655065 005	07/01/14	07/01/15	PER CLAIM/PER AGG \$ 2,000,000 AGGREGATE DEFENSE INCLUDED

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

OFFICE LOCATION: Tampa, FL 33602. PROJECT MGR: Charles Button. CONTRACT MGR: Charles Button. RE: Municipal Government Services (Public Works, Parks & Recreation, Public Relations). CONTRACT NUMBER: 15-01. CONTRACT END DATE: 2019. PROJECT NUMBER: 15-01. PROPOSAL NUMBER: 15-01. SECTOR: Public. \*\$2,000,000 SIR FOR STATES OF: LA, OH, TX. City of Dunwoody, their members, officers, employees and agents are added as an additional insured for general liability & auto liability as respects the negligence of the insured in the performance of insured's services to cert holder under contract for captioned work. Coverage is primary and certificate holder's insurance is excess and non-contributory. Waiver of subrogation is hereby granted in favor of cert holder for GL, AL and WC. \*THIS IS A SAMPLE CERTIFICATE ONLY\*

**CERTIFICATE HOLDER****CANCELLATION**

City of Dunwoody  41 Perimeter Center East, Suite 250  Dunwoody, GA 30346  USA	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 
--	---



#11.

## SUPPLEMENT TO CERTIFICATE OF INSURANCE

DATE

03/05/2015

NAME OF INSURED: Jacobs Engineering Group Inc.

THE ACTUAL CERTIFICATE FOR THE PROPOSED PROJECT WILL COMPLY WITH THE TERMS AND CONDITIONS NEGOTIATED IN THE FINAL CONTRACT, CONSISTENT WITH POLICY TERMS AND CONDITIONS.



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YY) #11.  
03/05/2015

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 LIC #0437153 1-212-948-1306 Marsh Risk & Insurance Services CIRTS_Support@internal.jacobs.com 777 S. Figueroa Street  Los Angeles, CA 90017-5822 Fax to: 1-212-948-1306		CONTACT NAME: PHONE (A/C, No. Ext): FAX (A/C, No): E-MAIL ADDRESS: PRODUCER CUSTOMER ID #:	
INSURED Jacobs Engineering Group Inc.  155 North Lake Avenue, 9th Floor  Pasadena, CA 91101		INSURER(S) AFFORDING COVERAGE INSURER A: Zurich American Insurance Company INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:	

**COVERAGES**

CERTIFICATE NUMBER: 43212274

REVISION NUMBER:


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

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	<b>GENERAL LIABILITY</b> <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DEDUCTIBLE RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> Y/N ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below					WC STATUTORY LIMITS OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	<b>Crime Coverage</b>		FID 9028144 10	02/01/15	02/01/16	Per Loss 1,000,000

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

OFFICE LOCATION: Tampa, FL 33602. PROJECT MGR: Charles Button. CONTRACT MGR: Charles Button. RE: Municipal Government Services (Public Works, Parks & Recreation, Public Relations). CONTRACT NUMBER: 15-01. CONTRACT END DATE: 2019. PROJECT NUMBER: 15-01. PROPOSAL NUMBER: 15-01. SECTOR: Public. \*THIS IS A SAMPLE CERTIFICATE ONLY\*. THE ACTUAL CERTIFICATE FOR THE PROPOSED PROJECT WILL COMPLY WITH THE TERMS AND CONDITIONS NEGOTIATED IN THE FINAL CONTRACT, CONSISTENT WITH POLICY TERMS AND CONDITIONS.

**CERTIFICATE HOLDER****CANCELLATION**

City of Dunwoody  41 Perimeter Center East, Suite 250  Dunwoody, GA 30346  USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE  
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SUPPLEMENT TO CERTIFICATE OF INSURANCE

DATE  
03/05/2015

NAME OF INSURED: Jacobs Engineering Group Inc.



## NORTH AMERICAN INFRASTRUCTURE SAFE DRIVER POLICY

### **PREAMBLE**

Driving is an essential aspect of each employee's scope of work; as such, travel by motor vehicle on behalf of the Company is required with some frequency. However, to the extent that an employee has a medical disability that precludes driving, Jacobs will do its best to afford reasonable accommodations. Operating a vehicle is also considered a safety sensitive activity performed by the employee that requires strict adherence to this Safe Driver Policy, as well as other related Jacobs Policies, such as Jacobs' Global Drug and Alcohol Policy.

This Safe Driver Policy applies to all employees under the following principles:

- Driving safely on behalf of the Company is an expectation of all employees.
- Employees are responsible and accountable for their own driving behaviors.
- All company related Motor Vehicle Incidents (MVI) shall be immediately reported and will be investigated.
- Repeated company related Motor Vehicle Incidents may result in remedial actions up to and including loss of all company driving privileges, discipline or termination (refer to NAI Disciplinary Procedure).
- Drivers are expected to comply with all applicable laws and best driving practices.

**We expect all NAI Jacobs' employees to embrace this policy.**

### **PRO-ACTIVE ACTIONS (PRE-INCIDENT)**

We have numerous procedures and requirements which apply to all of us that drive on company business – they are some of the “musts” in our job. In addition, we adopt the following Pro-Active practices.

### **DEFINITIONS**

***Designated Motor Vehicle Operator/Driver*** - Employee who **is issued** a company vehicle or client vehicle for long-term (i.e. greater than 3 months) use or who **is expected** to routinely drive on Company business, whether driving a Company, Client or personal vehicle.

***Non-Designated Motor Vehicle Operator/Driver***– Employee who **is not issued** a company vehicle or client vehicle for long-term use or who **is not** expected to routinely drive on Company business, whether driving a Company, Client, or Personal Vehicle.

***Smith System Driver Training*** – A one-day advanced driver training program presented by our vendor, Smith System. The training is conducted in both classroom and on-road. The following NAI employees shall be required to successfully complete this one-day driver course:

- All Designated Motor Vehicle Operator/Drivers

***Motor Vehicle Record Check*** - The following NAI employees will have their Motor Vehicle Record (MVR) pulled on at least an annual basis by a third party vendor, to be administered by HR:

- All Designated Motor Vehicle Operators will have their MVR pulled annually. This will occur the month following the employee's birth month.

- In addition to the above, both Designated and Non-Designated Motor Vehicle Operators/Drivers will have a MVR pulled after receiving the following :
  - A traffic violation or red light camera violation that occurs while operating a Company, Client, or Personal Vehicle on company business. Again, this does not apply to traffic violations that occur in a personal vehicle that **is not** being used for Company business.
  - A company related motor vehicle incident with an assigned classification of a D1 and/or DCI where it is determined by the Motor Vehicle Incident Review Committee that our driver had control to prevent the incident

***Routinely Drive*** – A Designated Motor Vehicle Operator/Driver whose job responsibilities require them to drive on company business, **daily**.

***Authorized Passengers*** - Authorized passengers in Company, Client, or Personal Vehicles while being driven on Company business shall be limited to:

- Company employees or employees of all subsidiaries,
- Consultants or subcontractors to the Company when on Company business,
- Company clients or potential clients, Company vendors, and others on legitimate Company business.
- The operator's immediate family and others, **if prior authorization is granted by their Manager**.

***Motor Vehicle*** - Motor vehicle means motorized over-the-road vehicles, i.e., cars, trucks, and vans.

***Company Vehicle*** – Any motor vehicle that is owned, leased, rented, or otherwise provided by or through the Company.

***Client Vehicle*** – Any motor vehicle that is owned, leased, rented, or otherwise provided by or through our Client.

***Personal Vehicle*** – Any motor vehicle **not** provided by the Company or Client that is used while engaged in Company business.

## **OUR FOUNDATION**

- Being assigned or authorized to drive a company vehicle, rental car, or your own personal vehicle for Company business is expected and requires strict adherence to the Company policy.
- Company vehicles are to be used for Company business only. The use of Company vehicles for personal business is prohibited. In certain locations, written agreements may allow for personal use of company Vehicles. Allow only authorized passengers to ride in Company vehicles.
- Anyone traveling on Company business as a driver or passenger is required to fasten their seat belts before the vehicle is in motion, whether on or off the highway. This applies to all motor vehicles, including off road equipment.
- All NAI employees that operate a vehicle while on Company business shall have been trained in the Company's defensive driving program and remained current in this training (see training section).
- Projects and offices are to track those employees assigned a Company owned/leased vehicle and the miles driven by those vehicles on monthly basis, whether assigned to the office or project.
- Company related motor vehicle incidents will be tracked by region, office, project, supervisor, and individual.



- Jacobs' policy prohibits cell phone/pager/text/smartphone/computer/two-way radio use while driving, including but not limited to texting or emailing by the driver when behind the wheel and the vehicle is in motion. Violations of this policy are grounds for discipline up to and including termination.
- Driving while impaired by alcohol, drugs, medicines, illness or fatigue (or any other condition that affects employee's ability) is also strictly prohibited. Any employee who is even slightly impaired (regardless of legal alcohol limits or use of lawful medication, etc.) shall not drive for any work or Company related event, even if that event is outside of working hours.

## **TRAINING**

- Employees that drive for Jacobs on company business shall first complete and stay current with the defensive drive on-line training modules through our selected vendor.
- In addition, all Designated Motor Vehicle Operators/Drivers shall complete a one-day advanced driver training program presented by our vendor, Smith System. See **Attachment 4 - Smith System Driver Direct Training Course Description**.
- The above noted training requirements shall also apply to all new hires that will be responsible to drive on company business or any current employee who has been re-assigned from a non-driving to a driving status.\*

\*In the event that the defensive driving training noted above cannot be scheduled through no fault of the respective Performance Unit and a delay in the employee being able to operate a vehicle on Company business would adversely affect a project, then an alternative driver training plan shall be signed-off by the employee's supervisor and strictly followed until the individual can successfully complete their required training. This alternative training plan will allow the employee to drive on Company business until they are able to enroll in the DDC on-line training and/or Smith System. Once enrolled, the employee shall immediately complete the training without any further delay since the alternative training plan is only good for 45 days. If the 45 days expires prior to the employee completing their DDC on-line training and/or Smith System training, then the employee's driving privileges shall be suspended until all required driver training has been successfully completed. The details of the alternative driver training plan are as follows, all three of which must be met:

- The employee's supervisor shall communicate to his/her employee the driving hazards (as referenced in the attached Arrive Alive Hazards Checklist) that are applicable to their respective region and the proper actions to take if those hazards are encountered.
- The employee's supervisor will also discuss NAI's Safe Driver Policy, Safe Driver Behaviors, and NAI Disciplinary Procedure to ensure these plans are understood and followed.
- The final requirement is for the supervisor to complete a ride-along with the employee. By using the attached Supervisor Driver Evaluation Road Test Form, the supervisor shall rate their employee's ability to safely operate a vehicle. If the supervisor passes the individual, then the employee will be granted a 45-day temporary authorization to operate a vehicle on Company business. Again, the employee must complete all company required defensive driver training within this 45-day window in order to change their driving privileges from a "temporary" to a "permanent" status.
- Additional defensive driver training courses may be added at a later time at the discretion of the NAI Senior HSE Manager.

## **DRIVER LICENSES**

- Employees that drive on Company business must have a current valid driver's license as required by prevailing local rules and regulations. Expatriates must obtain a domestic driver's license within the timeframe mandated by prevailing rules and regulations in their temporary US location. If an employee who drives on Company business has his/her driver's license or driving privileges suspended or restricted, that employee shall promptly inform Human Resources and their supervisor and shall comply with any and all driving restrictions. Violation of this policy is grounds for discipline up to and including termination.

- ACTION: All employees that drive on company business must enter their current driver's license information into Jacobs HRIS and keep it up to date

- Login to "Electronic Time System" (ETS)
- Click on "my HRIS Employee Self Service"
- Click on "Additional Information"
- Under "Types of Identification" (ID), complete the driver's license information section

- New hires and employees that may drive for Company business must authorize Jacobs Human Resources Department to obtain a copy of their Department of Motor Vehicles Records initially upon hire and on at least an annual basis.
  - Responsibilities under this category:  
Supervisors are responsible for having employees complete a Disclosure and Authorization form to obtain Department of Motor Vehicle Records. Contact the NAI Fleet Services Coordinator, Tina Kroeger for a copy of this document.
  - Responsibilities under this category:  
Employee's manager/supervisor is responsible for checking that the employee has a Driver's License (DL), insurance for personal vehicle if used for company business, and for employee to enter DL information into "My HRIS" as outlined above.

#### **VIOLATIONS WHILE DRIVING**

Employees are responsible for notifying Human Resources and their supervisor of all traffic citations and/or convictions received along with any other circumstances that could affect the employee's ability to drive either a company vehicle or their own personal vehicle for Company business.

This notification requirement does not apply to traffic citations and/or convictions that occur in a personal vehicle that is not being used for Company related business.

Reference the NAI Disciplinary Procedure for more details.

#### **G.P.S. MONITORING**

Jacobs is always attempting to create a safer environment as part of our commitment to safety. As driving is essential to each employee's scope of work, but a safety sensitive activity, the Company may from time to time institute policies and procedures, to further our commitment to safety.

The Company may, at its discretion, install the G.P.S. tracking systems in Company owned/leased vehicles. The G.P.S. shall be used to monitor Company owned/leased vehicles being driven by employees, with the information retrieved from the G.P.S. As is true of all Company property, Jacobs reserves the right to enter and/or inspect its vehicles at any time, including confirmation that the G.P.S. has not been shut off, tampered with or altered. Jacobs will evaluate the information retrieved by the G.P.S. and adverse driving information may subject the employee to disciplinary action up to and including termination.

#### **VEHICLE PLACARDING SYSTEM - CITIZEN CALLS**

Through a driving improvement service called Driver's Alert, we have implemented a placard-based system soliciting observations of driving behaviors from the public, by posting a reflective sign on the rear of our company owned/leased vehicles. The sign is not to be placed in the rear window. We believe this type of system will improve employee's driving behavior.

## **THE RIGHT DRIVING BEHAVIORS**

The following best practices have proven to promote good driving behavior and reduce motor vehicle incidents. Therefore, you shall implement these best practices.

- **Safe Plan of Action (SPA):**  
The SPA process is an essential element of preparing for the task at hand. Employees driving any vehicle for company business are to complete an SPA prior to a day of travel. As a supplement to each prepared SPA, use **Attachment 2 – Arrive Alive Hazards Checklist**. Completed SPAs shall be forwarded to your Supervisor.
- **Backing:**  
Backing is one of the leading causes of motor vehicle incidents. The following best practices regarding backing shall be followed:
  - Honk horn before backing.
  - When more than one person is in the vehicle, the other person will exit the vehicle and perform as “spotter” for our driver while backing.
    - The spotter will stand on the driver’s side of the vehicle when performing this task.
    - The driver will have their window down and radio(s) off.
  - Back into parking spaces or pull through when parking, so that the first move when departing the space is forward.
  - Avoid unnecessary backing
  - Placing a safety cone behind a parked vehicle is a best practice which ensures that the driver physically examines the area directly behind the vehicle for any potential hazards prior to backing. An orange safety cones is to be placed in all company owned/leased vehicles; these cones shall be used whenever parking a company owned/leased vehicle. Note: a 3"x3" magnetic placard that states “Be Aware 360°” can be used in lieu of the safety cone. Contact your local Fleet Coordinator for more details.
  - Backing sensors shall be used on all new company owned/leased vehicles and installed on existing vehicles that have not yet been equipped.
- **Vehicle Safety Kit:**  
We will equip company owned/leased vehicles with appropriate safety supplies in the form of vehicle travel safety kits. We encourage anyone that uses their personal vehicles to develop and carry a kit using their vehicle for extended business trips. Contact your local Fleet Coordinator for information on how to obtain the items to be included in this kit. Please reference **Attachment 3 - Vehicle Safety Kit**.
- **Supervisor Ride-Along:**  
Annually, supervisors (Regional level and below) will ride-along with employees that are assigned a company owned/leased vehicle to review, remind, and coach on driving risks and behaviors. A pre-requisite of the evaluator is that the evaluator must have completed the one-day Smith Systems Driver Direct Training. Reference **Attachment 1 - Supervisor Driver Evaluation Road Test Form**. A copy of this completed Evaluation Road Test form should be forwarded to our NAI Fleet Services Coordinator, Tina Kroeger.
- **Drive Less Campaign:**  
Since the most effective way to avoid work-related MVIs is to reduce unnecessary trips. Evaluate all alternatives and options prior to driving a vehicle on company business. Options such as: conference calling, WebEx conferencing, video conferencing, taking public transportation, carpooling, taking a taxi, walking or bicycling. Be creative! **Local offices and regions shall also attempt to reduce their inventory of company owned-leased vehicles.**

- Visibility:  
We want our vehicles to be as visible as possible to other motorists given the potential hazards encountered.
  - Vehicle Light Packages:  
Additional vehicle warning lighting is essential on projects associated with or adjacent to roadways. At least one of the lighting options listed below are a minimum when additional lighting is necessary (listed in order of preference).
    - LED strobes light bar (with low/high power switch)
    - Standard strobe light bar on top of the vehicle
  - Reflective Tape on Rear of Vehicles:  
The placement of appropriate state DOT approved reflective tape applied to the rear of our company owned/leased vehicles is a best practice that will be implemented in an effort to increase visibility and reduce rear-end collisions.  
  
On the tailgate of company leased pick-up trucks, reflective 4" wide tape, alternating Red and White, will be placed at 45 degree angle oriented out and down from the center.  
  
On the rear bumper of company leased passenger vehicles, 2" reflective tape, Red and White alternating, shall be installed
  - Side Mirrors:  
To provide our drivers a wider field of view, we will install convex mirrors (2" in diameter) to the side mirrors of all company owned/leased vehicles.




Please work with your local Fleet Coordinator to ensure compliance with equipping vehicles with safety kits, DOT reflective tape, convex mirrors, and traffic cones (or the magnetic placard).

## POST-INCIDENT RESPONSE ACTIONS

All motor vehicle incidents and traffic citations/convictions that occur while driving on company business shall be reported to the employee's supervisor as quickly as practical. In the event of injury to anyone, care and welfare of the injured individual always takes priority over reporting. When practical, supervisors are expected to travel to the scene of a motor vehicle incidents in order to assist our employee, independently survey the situation, and transport our employee to the clinic for post-incident drug screening.

### Incident Classifications

Motor Vehicle Incidents (MVI) are classified into three categories based on the severity of the incident. As shown below, this program parallels our safety incident classifications and allows us to put our priority on the most severe incidents. All MVI shall be reported using this three classification system.

Safety Category	Description		MVI Category	Description	Examples
<b>Recordable (External)</b>	OSHA industry metric		<b>DCI (External)</b>	DOT Crash incident	<ul style="list-style-type: none"> <li>– Vehicle disabled/towed</li> <li>– Off-site Medical Care required (3<sup>rd</sup> party medical provider)</li> <li>– Airbags deployed</li> <li>– Fatality</li> </ul>
<b>E-1 (Internal)</b>	Jacobs internal metric		<b>D-1 or Driver-1 (Internal)</b>	Measures incidents that reflect driver fault or where actionable prevention could've pre-empted	<ul style="list-style-type: none"> <li>– All incidents that injure someone ('off-site medical care' escalates to DCI)</li> <li>– Collision with:               <ol style="list-style-type: none"> <li>1. another vehicle or mobile equipment</li> <li>2. fixed object</li> <li>3. pedestrian/bicycle</li> </ol> </li> <li>– All incidents with a vehicle severity rating of 3 or higher</li> <li>– Any vehicle leaving roadway uncontrolled or unplanned</li> </ul>
<b>First Aid/ Near Miss (Internal)</b>	Jacobs internal metric		<b>OVI or Other Vehicle Incident (Internal)</b>	Jacobs internal metric used to evaluate trends	<ul style="list-style-type: none"> <li>– Unoccupied damage of vehicle</li> <li>– Bird or animal 'hits'</li> <li>– Rock, road debris, windshield or window damage</li> <li>– Non-work related incidents associated with company provided vehicle</li> <li>– Theft or vandalism</li> <li>– Violation of Traffic Laws</li> </ul>



### **MVI Investigation & Review**

Since the goal of this plan is to eliminate MVIs from the workplace, we adopt a process that helps us understand the cause of each incident, how the incident could be avoided, and communicate the findings to employees so that they can benefit from what we learned.

### **MVI Reporting and Investigation**

We expect the employee to contact their supervisor, and the supervisor to contact the HSE Department promptly after any MVI. The employee's supervisor, with assistance from HSE Department, shall investigate all MVI's that involve any company owned/leased vehicle at any time or that occur while operating any other vehicle on company business. The investigators should obtain and document pertinent facts, including:

1. Examining the scene of motor vehicle incidents. The employee's supervisor should visit the scene of the MVI to obtain information for the investigation. Pictures of the accident scene and/or damage are very helpful.
2. Interviewing the employee and other witnesses and documenting incident facts.
3. Confirming the validity of the employee's driver's license.
4. Drug Screen all drivers involved in DCI and D-1 incidents as soon as reasonably practical. Drug screening is required if the employee was behind the wheel when the incident occurred. Depending upon the circumstances, a supervisor may also require drug screening for an employee involved in an OVI incident. The Human Resources Department will identify the sample collection facility, and the employee's manager, supervisor, or co-worker is expected to transport the employee to the collection facility. Any deviation from mandatory drug screening requires GVP approval.
5. Obtaining copies of all police reports, if any.
6. Refer to the NAI Disciplinary Procedure for more post-incident actions to be taken.

**Severity Level Classifications**

<b>Actual or Worse Potential Severity Level</b>	<b>Injury / illness</b>	<b>Environment</b>	<b>Property</b>	<b>Motor Vehicle Incident (MVI)</b>
<b>5</b>	Fatality or total permanent disability	Serious off-site impact, significant remediation required	USD\$ > 3 million	Collision or leaving roadway involving speeds $\geq 50$ mph or any incident involving vehicle roll-over or collision with a pedestrian, bicycle or motorcycle
<b>4</b>	Partial disability; life changing; intensive care	Significant off-site impact, some remediation required	USD\$ 300k-3mill	Collision or leaving roadway involving speeds >40 mph and <50 mph
<b>3</b>	Urgent treatment; surgery	Release significantly above reportable limit or some local impact	USD\$ 30k-300k	Collision or leaving roadway involving speeds >30 mph and $\leq 40$ mph
<b>2</b>	Medical treatment to prevent deterioration	Release above reportable limit or minor impact	USD\$ 3k-30 k	Low speed collision or leaving roadway
<b>1</b>	Simple, immediate treatment	Small release contained onsite and no impact	USD\$ < 3 k	Non-collision incident or minor collision while stationary or moving at slow speed while parking, backing, or manoeuvring

## **JACOBS NAI SAFE DRIVER POLICY**

### **Acknowledgement Form**

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Acknowledgement and Receipt of Jacobs NAI Safe Driver Policy

I acknowledge that I have received a copy of Jacobs NAI Safe Driver Policy.

I understand that I am responsible for reviewing the policy and familiarizing myself with its contents, and for acting in compliance with the policy at all times. Violations of this policy may result in discipline up to and including termination for a first or subsequent offense.

- If I drive on company business and have my driver's license or driving privileges suspended or restricted, I shall promptly inform Human resources and my supervisor and shall comply with any and all restrictions. I further agree to timely and truthfully report driving-related convictions (includes pleas of guilty and noncontendere)
- I understand that employees who drive on company business must authorize Jacobs Human Resources to obtain copy of their motor vehicle/driving records and license verification initially upon hire and on at least an annual basis, and I agree to provide appropriate authorization.

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Name of Employee (Please Print)

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Employee's Signature

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Date of Employee Signature

Copy to personnel file

**JACOBS NAI  
G.P.S. MONITORING**

**Acknowledgement Form**

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I hereby acknowledge that I have been provided a vehicle by Jacobs for use on Company business. A Company owned vehicle may be a vehicle owned by the Company or leased by the Company. I further acknowledge that on receipt of my assigned vehicle, I agree to comply with any Company policy regarding driving and use of Company property.

As is true of all Company property, the Company reserves the right to enter and/or inspect its vehicles at any time and I hereby consent to such inspections.

I also acknowledge that I am aware that the Company may at its discretion, from time to time, install G.P.S. tracking systems in company owned/leased vehicles and will monitor Company vehicles. I acknowledge that I have been made aware of the installation of the G.P.S. monitoring system and agree that I will not shut off, tamper with, alter, or remove the G.P.S. device.

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Name of Employee (Please Print)

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Employee's Signature

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Date of Employee Signature

Copy to personnel file

## ATTACHMENT 1: SUPERVISOR DRIVER EVALUATION ROAD TEST FORM

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

Vehicle Description: \_\_\_\_\_

Observed and Evaluated by: \_\_\_\_\_

*Note: All of the skills tested are important to help prevent accidents.*

### **Pre-Trip Inspection Check List**

- Yes No Performed Walk-around inspection of general condition of vehicle
- Yes No Pre-planned route for trip
- Yes No Prepared Safe Plan of Action for trip
- Yes No Safely stowed materials, equipment and paperwork
- Yes No Inspected condition of tires
- Yes No Adjusted rear view mirror
- Yes No Checked emergency equipment
- Yes No Checked gasoline gauge and planned trip fill-ups
- Yes No Checked dashboard for warning gauges

Comments:

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### **Vehicle Operation**

- Yes No Uses seat belt
- Yes No Starts vehicle properly
- Yes No Checks traffic patterns
- Yes No Does not allow vehicle to roll while stopped
- Yes No Drives with both hands on wheel
- Yes No Steers smoothly
- Yes No Maintains pace with traffic but does not exceed speed limits
- Yes No Maintains proper speed for conditions
- Yes No Maintains proper distance between vehicle in front
- Yes No Does not adjust climate controls, audio system or other equipment while driving
- Yes No Does not demonstrate aggressive driving habits or attitudes

Comments:

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### **Backing and Parking**

- Yes No Stops in correct position
- Yes No Parks defensively in parking lots or chooses defensive parking locations
- Yes No Avoids backing – makes first move forward
- Yes No Gets out of vehicle and checks entire area, including overhead before backing
- Yes No Uses orange traffic cones appropriately to mark parked vehicle
- Yes No Uses back-up proximity sensor and/or closed circuit TV monitor for backing
- Yes No Uses mirrors properly

Comments:

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**Intersections**

Yes No Prepares to stop vehicle if necessary, even if traffic signal is green  
 Yes No Checks in all directions for traffic conditions  
 Yes No Stops vehicle in proper location when required  
 Yes No Does not allow vehicle to roll when stopped

Comments:

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**Turning**

Yes No Makes sure vehicle is in proper lane for turn  
 Yes No Signals intention to turn well in advance  
 Yes No Approaches turn at proper speed  
 Yes No Checks traffic conditions and turns only when intersection is clear  
 Yes No Keeps vehicle in proper lane during turn

Comments:

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**Passing**

Yes No Only passes in safe location, where legally permitted  
 Yes No Checks ahead and behind to make sure passing room is adequate  
 Yes No Warns vehicle ahead of intention to pass  
 Yes No Uses directional signals properly  
 Yes No Leaves sufficient space between vehicles before moving back into lane  
 Yes No Does not exceed speed limit

Comments:

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**Cell Phones**

Yes No Uses only when safely stopped off street or highway  
 Yes No Acknowledges Jacobs' prohibition of use of cell phone and 2-way radios while driving

**Summary & Recommendations** (check appropriate recommendation and write in additional recommendations, if warranted)

☐ ☐ **Passed**      **Approved to drive:**      \_\_\_\_\_ **Service pick-up**  
    \_\_\_\_\_ **with trailer or equipment in tow**  
    \_\_\_\_\_ **Service van**  
    \_\_\_\_\_ **Passenger Car**

☐ ☐ **Not Acceptable**      ☐ **Improvement Plan Developed/Reviewed (attach copy)**  
    **Re-Test in \_\_\_\_\_ months**

**Additional Comments:**

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**Signature of Evaluator/Supervisor:** \_\_\_\_\_

**Signature of Driver:** \_\_\_\_\_

Copy to personnel file  
 Copy Tina Kroeger, NAI Fleet Services Coordinator

## ATTACHMENT 2: ARRIVE ALIVE HAZARDS CHECKLIST

### ROUTE HAZARDS

- |  |   |   |   |
|--|---|---|---|
| <input type="checkbox"/> Interstate        | <input type="checkbox"/> Tailgaters         | <input type="checkbox"/> Parking garage     | <input type="checkbox"/> No place to park           |
| <input type="checkbox"/> Expressway        | <input type="checkbox"/> Unclear directions | <input type="checkbox"/> Street parking     | <input type="checkbox"/> High crime area            |
| <input type="checkbox"/> Rural roads       | <input type="checkbox"/> No directions      | <input type="checkbox"/> Unknown location   | <input type="checkbox"/> Pot holes                  |
| <input type="checkbox"/> Truck traffic     | <input type="checkbox"/> Bicycle traffic    | <input type="checkbox"/> Motorcycle traffic | <input type="checkbox"/> Blind intersection         |
| <input type="checkbox"/> Road construction | <input type="checkbox"/> Pedestrians        | <input type="checkbox"/> Wide turns         | <input type="checkbox"/> Double parking             |
| <input type="checkbox"/> Steep inclines    | <input type="checkbox"/> Off-road           | <input type="checkbox"/> Forest roads       | <input type="checkbox"/> Non-maintained roads       |
| <input type="checkbox"/> Tolls             | <input type="checkbox"/> Heavy traffic      | <input type="checkbox"/> Tight turns        | <input type="checkbox"/> Never been this way before |

### WEATHER HAZARDS

- |   |  |   |  |
|---|--|---|--|
| <input type="checkbox"/> Sun glare      | <input type="checkbox"/> Snow blind    | <input type="checkbox"/> Snow             | <input type="checkbox"/> Icy           |
| <input type="checkbox"/> Rain           | <input type="checkbox"/> Fog           | <input type="checkbox"/> Black Ice        | <input type="checkbox"/> Freezing rain |
| <input type="checkbox"/> Sleet          | <input type="checkbox"/> Cold          | <input type="checkbox"/> Hot              | <input type="checkbox"/> Humidity      |
| <input type="checkbox"/> Slippery roads | <input type="checkbox"/> Flooded roads | <input type="checkbox"/> Washed out roads |  |

### TIME HAZARDS

- |  |                                    |  |
|--|------------------------------------|--|
| <input type="checkbox"/> Sunrise                           | <input type="checkbox"/> Sunset    | <input type="checkbox"/> School buses        |
| <input type="checkbox"/> Traffic congestion                | <input type="checkbox"/> Dark      | <input type="checkbox"/> Oncoming headlights |
| <input type="checkbox"/> Other drivers under the influence | <input type="checkbox"/> Rush Hour | <input type="checkbox"/> Driver Fatigue      |
| <input type="checkbox"/> Animals crossing road             |                                    |  |

### OTHER HAZARDS

- |  |   |   |
|--|---|---|
| <input type="checkbox"/> Theft/Security Issues | <input type="checkbox"/> EMS service              | <input type="checkbox"/> Animals            |
| <input type="checkbox"/> Road debris           | <input type="checkbox"/> Personal Illness         | <input type="checkbox"/> Distracted drivers |
| <input type="checkbox"/> Children              | <input type="checkbox"/> Personal crimes Violence |   |

### ADDITIONAL OBSERVATIONS

At the end of your trip, record any observations and/or lessons learned that are worth remembering or should be passed along:

- |                                    |  |
|------------------------------------|--|
| • New road construction            | • Leaving by ____ time helps avoid rush hour |
| • Mechanical problems with vehicle | • Windshield needs cleaned                   |
| • No cell service at location      | • Found better route                         |
| • Closest hospital or clinic       | • Directions inaccurate                      |

Copy to personnel file  
Copy Tina Kroeger, NAI Fleet Services Coordinator

## ATTACHMENT 3: VEHICLE SAFETY KIT

The following items are required when developing a vehicle safety kit. The majority of the items should remain in the vehicle at all times. Some offices have obtained duffle bags to put these items in and have extra ones available for those that may be using their personal vehicle for business travel. Feel free to modify the items in your kit to best fit your needs, conditions, and/or environment.

### **Company Vehicle (*retain in company vehicles*):**

- PPE: Hard Hat, Safety Glasses, Safety Vests, Gloves
- Orange cone (or a 3"x3" "Be Aware 360°" placard)
- Jumper cables
- Flash light
- Windshield washer fluid
- First Aid Kit
- Vehicle strobe light, if vehicle not equipped
- Orange triangle kit
- Fire extinguisher
- Blanket
- Ice scraper & snow brush
- Communication device (*e.g. cell phone, radio, satellite phone*)
- Motor Vehicle SPA cards
- Motor Vehicle Incident Report

### **Travel Kit (*items listed above, plus consider the following*):**

- Energy bars and water, emergency electrolyte replacements
- Hand sanitizer packets
- Light sticks

## ATTACHMENT 4: SMITH SYSTEM DRIVER DIRECT TRAINING



### DriverDirect

#### One-Day Advanced Driver Training Program.

**The Overall Concept** Our experienced trainers present the Smith 5 Keys to your drivers through real world, on-the-road teaching, it is the program nucleus.

Most drivers have potentially dangerous patterns imbedded within their driving skills. The goal of this course is to identify individual problem areas and promote the changes that years of driving experience alone cannot achieve. Our unique strength is our proven ability to deliver advanced information in a straightforward manner so that your employees will instantly recognize the practical tools we present for improving their observation and driving skills.

While we begin in the classroom, to accomplish our goal, we spend most of the day on-road. Our classes are limited to five individuals per instructor so that we may give sufficient attention to each student.

**Classroom Training** We identify the causes of accidents, introduce Smith System concepts, discuss backing and parking collisions and their solutions, and show our latest video on our techniques. This is also a time to create a positive attitude about why the students are in a Smith System class. These elements are explained in a matter of approximately two hours; then, we go on-road where our training has the most impact.

**On-Road Training** We don't practice in a parking lot; our training is conducted in actual traffic situations. This real world environment allows our instructor to recognize your employee's individual driving flaws and provide the information and motivation necessary to bring about positive, tangible improvement in each student.

The hands-on learning process consists of three separate behind-the-wheel sessions for each student.

- ☐ **Get Acquainted Drive** -- In the first drive, each student performs a short "get acquainted" drive to get the feel of the vehicle and allow our instructor to do a preliminary evaluation of individual driving habits.
- ☐ **Demonstration Drive** -- Our instructor takes the wheel to demonstrate and explain different techniques used while navigating through traffic. This establishes the program's credibility and opens everyone's eyes to an entirely new way of compensating for other drivers and traffic conditions. We show how risk exposure is dramatically reduced without impacting their productivity.

- **The Coaching Drive** -- Our instructor provides each driver with insight and recommended actions as the fluid traffic picture unfolds. Mistakes are being corrected as they happen – the most effective way to learn. The presentation is structured so that the whole group is involved, allowing reinforcement of the Smith System even when students aren't actively driving. This is obvious as each successive driver performs better than the last.
- **Measurement** -- No learning process is complete without a measurement of what was learned. The final drive allows each student to demonstrate their ability to apply our methods without guidance and provides an opportunity for our instructor to formally evaluate each participant. The rest of the group is assigned specific points to observe. At the completion of each student's final drive, our instructor guides a constructive group discussion covering in-depth analysis of the driver's decisions and actions.

**Evaluation** At the end of the driving phase, each student gets a written evaluation from our instructor and printed materials summarizing the key points of the day. Additionally a Certificate of Completion will be distributed to each person successfully completing the program. A copy of our instructor's driver evaluations and student critiques of our instructor's presentation will be provided to you or your company's specified contact.

The whole process is positive and upbeat; students are never demeaned or made to feel foolish about their mistakes. Rather, they leave feeling confident about what they've accomplished and eager to practice what they've learned.

**Customization** We recognize that you may have unique problems and needs, and our team is ready to customize the class to focus on your particular concerns. Whether or not your company requires a customized approach, be assured that our experience in this field allows us to make a positive difference in how drivers operate their vehicles.

**A Proven System** Our continued success has allowed us to improve the fleet safety records at over half of the current Fortune 500 companies; many have had collision reductions in excess of 50 percent. While we can't guarantee such fabulous results to every company, generally, a 15 to 20 percent reduction in a single year will prove cost effective. And since a single accident can be terribly tragic and have financially devastating consequences, effective driver training can be one of the very best investments a safety-conscious organization can make.

**Fees and Facilities** Maximum class size is five participants. The fee for a single Smith System One-Day Advanced Driver Training Program is \$1,220.00, plus instructor expenses. For two or more consecutive days, this fee decreases to \$1,120.00 per day, plus instructor expenses. When possible, local Smith System instructors will be provided and expenses will be greatly reduced. Expenses for local instructors include lunch @ \$12.00 per day and mileage calculated at the Internal Revenue Service rate per mile. Expenses may include airfare or mileage, hotel, rental car, meals @ \$40 per day and a travel day expense of \$160 plus miscellaneous costs incurred. Client will be billed for actual expenses incurred. If a formal quote is required, please provide specific training locations. We only require that you provide the meeting facility, and a training vehicle large enough to accommodate the group (typically a van).

**JACOBS®**

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City of  
**Dunwoody** \*