

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby authorize the Presiding Commissioner to sign the attached Finding of Public Nuisance and Order for Abatement of a public nuisance located at 5601 E. Arnold Lane, parcel #24-802-27-00-017.00 01

Done this 19th day of November, 2013.

ATTEST:

Wendy S. Noren
Wendy S. Noren
Clerk of the County Commission

Daniel K. Atwill
Daniel K. Atwill
Presiding Commissioner

Karen M. Miller
Karen M. Miller
District I Commissioner

Janet M. Thompson
Janet M. Thompson
District II Commissioner

5601 E Arnold Lane Hartsburg, MO pictures taken 11/5/13 by Kala Wekenborg



**BEFORE THE COUNTY COMMISSION OF
BOONE COUNTY, MISSOURI**

In Re: Nuisance Abatement)	November Session
5601 E Arnold Lane)	October Adjourned
Hartsburg, MO 65039)	Term 2013
)	Commission Order No. <u>516-2013</u>

FINDING OF PUBLIC NUISANCE AND ORDER FOR ABATEMENT

NOW on this 19th day of November 2013, the County Commission of Boone County, Missouri met in regular session and entered the following findings of fact, conclusions of law and order for abatement of nuisance:

Findings of Fact and Conclusions of Law

The County Commission finds as fact and concludes as a matter of law the following:

1. The Boone County Code of Health Regulations (the "Code") are officially noticed and are made a part of the record in this proceeding.
2. The City of Columbia/Boone County Health Department administrative record is made a part of the record in this proceeding and incorporated herein by reference. In addition, any live testimony of the official(s) of the department and other interested persons are made a part of the record in this proceeding.
3. A public nuisance exists described as follows: weeds in excess of twelve inches on the premises.
4. The location of the public nuisance is as follows: 5601 E Arnold Lane SUR 383-940 PT S1/2 SE parcel #24-802-27-00-017.00 01 Section 27, Township 46, Range 12 as shown by deed book 1741 page 0531 , Boone County
5. The specific violation of the Code is: weeds in excess of twelve inches high on the premises in violation of section 6.7 of the Code. The Health Director's designated Health Official made the above determination of the existence of the public nuisance at the above location. Notice of that determination and the requirement for abatement was given in accordance with section 6.10.1 of the Code on the 13th day of October, 2013, to the property owner, occupant, and any other applicable interested persons.
7. The above described public nuisance was not abated. As required by section 6.10.2 of the Code, the property owner, occupant, and any other applicable interested persons were given notice of the hearing conducted this date before the Boone County Commission for an order to abate the above nuisance at government expense with the cost and expense thereof to be charged against the above described property as a special tax bill and added to the real estate taxes for said property for the current year.
8. No credible evidence has been presented at the hearing to demonstrate that no public nuisance exists or that abatement has been performed or is unnecessary; accordingly,

in accordance with section 6.10.2 of the Code and section 67.402, RSMo, the County Commission finds and determines from the credible evidence presented that a public nuisance exists at the above location which requires abatement and that the parties responsible for abating such nuisance have failed to do so as required by the Health Director or Official's original order referred to above.

Order For Abatement Chargeable As a Special Assessment To The Property

Based upon the foregoing, the County Commission hereby orders abatement of the above described public nuisance at public expense and the Health Director is hereby authorized and directed to carry out this order.

It is further ordered and directed that the Health Director submit a bill for the cost and expense of abatement to the County Clerk for attachment to this order and that the County Clerk submit a certified copy of this order and such bill to the County Collector for inclusion as a special assessment on the real property tax bill for the above described property for the current year in accordance with section 67.402, RSMo.

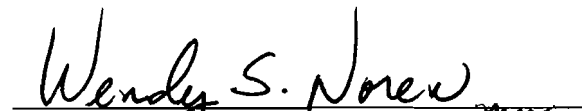
WITNESS the signature of the presiding commissioner on behalf Boone County Commission on the day and year first above written.

Boone County, Missouri
By Boone County Commission



Presiding Commissioner

ATTEST:



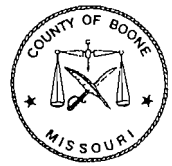
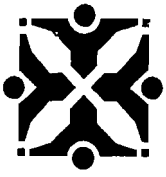
Boone County Clerk

ACTIVITY LOG

5601 E Arnold Lane

August 1, 2013	Citizen complaint received
August 1, 2013	Inspection conducted
August 5, 2013	Notice of violation sent to owner via Certified Mail
August 27, 2013	Certified letter returned to Health Department unclaimed
October 13, 2013	Notice of declaration of public nuisance and order of abatement posted in Columbia Daily Tribune
November 5, 2013	Reinspection conducted, violation still present
November 5, 2013	pictures taken
November 5, 2013	Hearing notice sent via First Class Mail

This property is currently vacant. The owner of the property lives in Richland, MO. There is no telephone number available in online searches for the owner. The property has historically been used as rental property.



HEARING NOTICE

Jacob E and Donna H Williams
38530 Fairview Road
Richland, MO 65556

An inspection of the property you own located at 5601 E Arnold Lane (parcel # 24-802-27-00-017.00 01) was conducted on August 5, 2013 and revealed weeds in excess of twelve inches on the premises. A notice of declaration of public nuisance and order for abatement was published in the Columbia Daily Tribune on October 13, 2013. This condition is declared to be a nuisance and a violation of Boone County Public Nuisance Ordinance Section 6.7.

You are herewith notified that a hearing will be held before the County Commission on Tuesday, November 19, 2013 at 9:30 AM in the County Commission Chambers at the Boone County Government Center, 801 E. Walnut Street, Columbia, Missouri. The purpose of this hearing will be to determine whether a violation exists. If the County Commission determines that a violation exists, it will order the violation to be abated.

If the nuisance is not removed as ordered, the County Commission may have the nuisance removed. All costs of abatement, plus administrative fees, will be assessed against the property in a tax bill. **If the above nuisance condition has been corrected prior to the hearing, you do not have to appear for the hearing.**

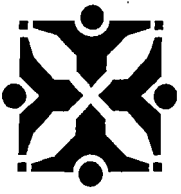
The purpose of these ordinances is to create and maintain a cleaner, healthier community. If you have any questions, please do not hesitate to contact our office. If you are not the owner or the person responsible for the care of this property, please call our office at the number listed at the bottom of this letter.

Sincerely,

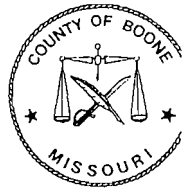
Kala Wekenberg
Environmental Public Health Supervisor

This notice deposited in the U.S. Mail, first class postage paid on the 5 day of November, 2013 by KC.

1005 W. Worley ♦ P.O. Box 6015 ♦ Columbia, Missouri 65205-6015
Phone: (573) 874-7346 ♦ TTY: (573) 874-7356 ♦ Fax: (573) 817-6407
www.GoColumbiaMo.com



CITY OF COLUMBIA/BOONE COUNTY, MISSOURI



HEALTH DEPARTMENT
DIVISION OF ENVIRONMENTAL HEALTH

NOTIFICATION OF DETERMINATION OF PUBLIC HEALTH HAZARD AND/OR NUISANCE AND ORDER FOR ABATEMENT

Jacob E and Donna H Williams
38530 Fairview Road
Richland, MO 65556

An inspection of the property you own on located at 5601 E Arnold Lane (parcel # 24-802-27-00-01700 01) was conducted on August 1, 2013 and revealed growth of weeds in excess of twelve inches high on the premises.

This condition is hereby declared to be a nuisance. You are herewith notified that you must begin correcting this condition within 7 days of receipt of this notice and order and that if the above nuisance condition has not been fully corrected within **15 days** after the receipt of this notice, an additional enforcement action will result for violation of Boone County Public Nuisance Ordinance Section 6.7. A reinspection will be conducted at the end of the 15-day period. If the weeds have not been cut by that time, a hearing before the Boone County Commission will be called to determine whether a violation exists. If the County Commission determines that a violation exists and the weeds are not cut and removed as ordered, the County Commission may have the weeds cut and removed with the cost of abatement, plus administrative fees, charged against the property in a tax bill. In addition, a complaint may be filed against you in Circuit Court. **If the weeds are cut within the 15-day period, no further action is necessary.**

The purpose of these ordinances is to create and maintain a cleaner, healthier community. If you have any questions, please do not hesitate to contact our office. If you are not the owner or the person responsible for the care of this property, please call our office at the number listed at the bottom of this letter. Your cooperation is greatly appreciated.

Sincerely,

Kala Wakenborg
Environmental Public Health Supervisor

This notice deposited in the U.S. Mail certified, return receipt requested on the 5 day of August 2013 by KW.

1005 W. Worley • P.O. Box 6015 • Columbia, Missouri 65205-6015
Phone: (573) 874-7346 • TTY: (573) 874-7356 • Fax: (573) 817-6407
www.GoColumbiaMo.com



Re: 5601 E Arnold Lane bid

Cliff Hayward <tpmowing@gmail.com>

Tue, Nov 5, 2013 at 1:20 PM

To: Kala Wekenborg <mawekenb@gocolumbiamo.com>

Kala. The bid for 5601 arnold lane is 120 dollars.
Sent from my U.S. Cellular® Smartphone

Kala Wekenborg <mawekenb@gocolumbiamo.com> wrote:

>Hi Cliff,

>

>I know it's November... Sorry :/ Can I get a bid for weeds at 5601 E Arnold
>Lane in Hartsburg?

>

>We got this complaint very late in the summer - the owners didn't sign for
>the Certified letter and we had to post in paper so this one has taken a
>while.

>

>I have a hearing with the County Commission on November 19

>

>Thanks

>

>Kala

>

>--

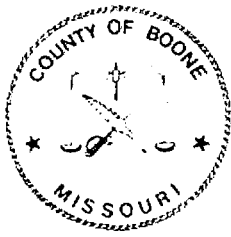
>Kala Wekenborg, MHA

>Environmental Public Health Supervisor

>Columbia/Boone County Public Health and Human Services

>573-874-7346

>www.gocolumbiamo.com



Tom Schauwecker
Boone County Assessor

Boone County Government Center
 801 E. Walnut, Rm 143
 Columbia, MO 65201-7733

Office (573) 886-4270
 Fax (573) 886-4254

Parcel 24-802-27-00-017.00 01 **Property Location** 5601 E ARNOLD LN

City Road COUNTY ROAD DISTRICT (CO) School ASHLAND (R1)
 Library BOONE COUNTY (L1) Fire SOUTHERN BOONE COUNTY (F2)

Owner WILLIAMS JACOB E & DONNA H
 Address 38530 FAIRVIEW RD
 City, State Zip RICHLAND, MO 65556

Subdivision Plat Book/Page
 Section/Township/Range 27 46 12

AUG 05 2013

Legal Description SUR 383-940 PT S 1/2 SE
 Lot Size 155 x 175
 Deeded Acreage 0.62

Deed Book/Page 1741 0531

Current Appraised				Current Assessed			
Type	Land	Bldgs	Total	Type	Land	Bldgs	Total
RA	10,400	3,000	13,400	RA	1,976	570	2,546
Totals	10,400	3,000	13,400	Totals	1,976	570	2,546

Most Recent Tax Bill(s)

www.ShowMeBoone.com, Boone County, Missouri. 801 East Walnut Columbia, MO 65201 USA.



weed complaint

Brittany Klusman <bjklusma@gocolumbiamo.com>
To: Michala Gunier <mawekenb@gocolumbiamo.com>

Thu, Aug 1, 2013 at 10:45 AM

5651 E Arnold Lane, Ashland (Right off Route A)
Right next door the weeds are out of control
It is an abandoned mobile home

5601

Loyd Berry
489-3792
659-8187

--
Thanks,

Brittany Klusman
Administrative Assistant II
Columbia/Boone County
Public Health and Human Services
1005 W Worley Street
Columbia, MO 65203
573-817-6441
BJKlusma@GoColumbiaMo.com



Lloyd Berry Weeds/Grass Update on Arnold Lane

Katy Cassidy <kkcassid@gocolumbiamo.com>

Wed, Oct 9, 2013 at 2:56 PM

To: "Gunier, Michala" <mawekenb@gocolumbiamo.com>

Cc: Kristine Vellema <knvellem@gocolumbiamo.com>, Kara Stowers <kastower@gocolumbiamo.com>

Kala,

Lloyd ask for you and said he had talked to you once about this property.
Lloyd lives at 5651 Arnold Lane and the property next door to him has weeds and grass, he was wanting an update. Please call him at: 573-657-1039

Thank you,

--

Katy Cassidy, ASA III

Columbia/Boone County

Public Health and Human Services

Division of Environmental Health

1005 W. Worley Street

Columbia, MO 65203

Phone: 573-874-7346 Fax: 573-817-6407

KKCassid@gocolumbiamo.com

English

Customer Service

USPS Mobile

Register / Sign In



Search USPS.com or Track Packages

Quick Tools

Track

Enter up to 10 Tracking # Find

Find USPS Locations

Buy Stamps

Schedule a Pickup

Cancel a Pickup

Find a Post Office

Hold Mail

Change of Address

Ship a Package

Send Mail

Manage Your Mail

Shop

Business Solutions



Customer Service >

Have questions? We're here to help.

Tracking Number: 70123460000112823743

Requested label is archived.

Restore Archived Details >

Product & Tracking Information

Available Options

Postal Product:

Features:

Certified Mail™



August 27, 2013, 7:00 am

Delivered

COLUMBIA, MO 65205

Track Another Package

What's your tracking (or receipt) number?

Enter tracking number or receipt number

Track It

LEGAL

Privacy Policy >

Terms of Use >

FOIA >

No FEAR Act EEO Data >

ON USPS.COM

Government Services >

Buy Stamps & Shop >

Print a Label with Postage >

Customer Service >

Delivering Solutions to the Last Mile >

Site Index >

ON ABOUT.USPS.COM

About USPS Home >

Newsroom >

USPS Service Alerts >

Forms & Publications >

Careers >

OTHER USPS SITES

Business Customer Gateway >

Postal Inspectors >

Inspector General >

Postal Explorer >



Copyright© 2013 USPS. All Rights Reserved

AFFIDAVIT OF PUBLICATION

STATE OF MISSOURI) ss.
County of Boone)

I, Breanne May, being duly sworn according to law, state that I am one of the publishers of the Columbia Daily Tribune, a daily newspaper of general circulation in the County of Boone, State of Missouri, where located; which newspaper has been admitted to the Post Office as periodical class matter in the City of Columbia, Missouri, the city of publication; which newspaper has been published regularly and consecutively for a period of three years and has a list of bona fide subscribers, voluntarily engaged as such, who have paid or agreed to pay a stated price for a subscription for a definite period of time, and that such newspaper has complied with the provisions of Section 493.050, Revised Statutes of Missouri 2000, and Section 59.310, Revised Statutes of Missouri 2000. The affixed notice appeared in said newspaper on the following consecutive issues:

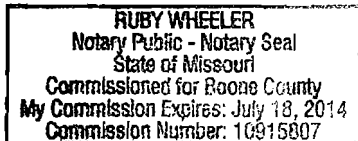
- 1st Insertion _____ October 13, 2013
- 2nd Insertion _____
- 3rd Insertion _____
- 4th Insertion _____
- 5th Insertion _____
- 6th Insertion _____
- 7th Insertion _____
- 8th Insertion _____
- 9th Insertion _____
- 10th Insertion _____
- 11th Insertion _____
- 12th Insertion _____
- 13th Insertion _____
- 14th Insertion _____
- 15th Insertion _____
- 16th Insertion _____
- 17th Insertion _____
- 18th Insertion _____
- 19th Insertion _____
- 20th Insertion: _____
- 21st Insertion: _____
- 22nd Insertion: _____

\$69.25
Printer's Fee

By: Breanne May
Breanne May

Subscribed & sworn to before me this 14 day of October, 2013

[Signature]
Notary Public



NOTICE OF DECLARATION OF PUBLIC NUISANCE AND ORDER OF ABATEMENT

To:
Jacob E and Donna H Williams
38530 Fairview Road
Richland, MO 65556

In accordance with section 67.402 RSMo and section 6.10. Boone County Code of Health Regulations, the undersigned gives notice to the above named persons or entities that the following described real property is hereby declared to contain the following described public nuisance which is ordered abated within 15 days of the date of this notice, and that if such abatement does not occur, then such nuisance may be ordered abated by action of the Columbia/Boone County Department of Public Health, with the cost thereof to be the subject of a special tax bill against the property subject to abatement.

Property Description: 5601 E Arnold Lane parcel number 24-802-27-00-017.00 01 Hartsburg, Boone County, Missouri as shown by deed book 1741 page 0531

Type of Nuisance: Weeds in excess of twelve inches high on the premises in violation of section 6.7 of the Boone County Public Nuisance Ordinance.

The above named persons are further notified that if they fail to abate such nuisance within the time specified in this notice, or fail to appeal this declaration of public nuisance and order of abatement within the time permitted for abatement specified in this notice, then a public hearing shall be conducted before the Boone County Commission, Commission Chambers, 801 E. Walnut, Columbia MO 65201, at a time and date determined by the Commission, and the County Commission will make findings of fact, conclusions of law and a final decision concerning the public nuisance and order of abatement set forth herein. For information concerning these proceedings, contact the Columbia/Boone County Health Department, 1005 W. Worley Street, Columbia, MO 65203.

Date of Declaration, Order and Publication:

Stephanie Browning, Director,
Columbia/Boone County
Health Department

INSERTION DATE: October 13, 2013

NOTICE OF DECLARATION OF PUBLIC NUISANCE
AND ORDER OF ABATEMENT

To: Jacob E and Donna H Williams
38530 Fairview Road
Richland, MO 65556

In accordance with section 67.402 RSMo and section 6.10, Boone County Code of Health Regulations, the undersigned gives notice to the above named persons or entities that the following described real property is hereby declared to contain the following described public nuisance which is ordered abated within 15 days of the date of this notice, and that if such abatement does not occur, then such nuisance may be ordered abated by action of the Columbia/Boone County Health Department, with the cost thereof to be the subject of a special tax bill against the property subject to abatement.

Property Description: 5601 E Arnold Lane Hartsburg, Boone County, Missouri as shown by deed book 1741 page 0531

Type of Nuisance: weeds in excess of twelve inches high on the premises in violation of section 6.7 of the Boone County Public Nuisance Ordinance.

The above named persons are further notified that if they fail to abate such nuisance within the time specified in this notice, or fail to appeal this declaration of public nuisance and order of abatement within the time permitted for abatement specified in this notice, then a public hearing shall be conducted before the Boone County Commission, Commission Chambers, 801 E. Walnut, Columbia MO 65201, at a time and date determined by the Commission, and the County Commission will make findings of fact, conclusions of law and a final decision concerning the public nuisance and order of abatement set forth herein. For information concerning these proceedings, contact the Columbia/Boone County Health Department, 1005 W. Worley Street, Columbia, MO 65203.

Date of Declaration, Order and Publication: _____

Stephanie Browning, Director, Columbia/Boone County Health Department

COLUMBIA DAILY TRIBUNE

P.O. Box 798 • Columbia, MO • 65205-0798





BILLING PERIOD END DATE		ADVERTISER/CLIENT NAME	
10/15/13		CC HEALTH DEPT (PO140101)	
TOTAL AMOUNT DUE	INVOICE NUMBER	TERMS OF PAYMENT	
69.25	1171601	NET 30 DAYS	

PAGE #	BILLING DATE	BILLED ACCOUNT NUMBER	PARENT ACCOUNT NUMBER
1	10/15/2013	10270	10270


INVOICE

BILLED ACCOUNT
NAME & ADDRESS

CC HEALTH DEPT (PO140101)
*** ACCTS PAYABLE
1005 W WORLEY ST
COLUMBIA MO 65203-2037

CREDIT CARD PAYMENTS	
 Card Number: _____	_____
 Exp. Date: _____	Amt. to pay: _____
 Signature: _____	_____
 Name on Card: _____	_____

PLEASE DETACH AND RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	REFERENCE	PUB	DESCRIPTION - OTHER COMMENTS / CHARGES	SIZE/PAGES	TIMES	RATE	BALANCE
10/13	2002435	CDT	Williams	75.00	1		68.25
10/13	2002435	CDT	Bold word charge	75.00	1		1.00
10/13							
10/13							
PLEASE PAY THIS AMOUNT 							69.25

COLUMBIA DAILY
TRIBUNE

101 North 4th Street • P.O. Box 798
Columbia, MO 65205 • (573) 815-1500

*UNAPPLIED AMOUNTS ARE INCLUDED IN TOTAL AMOUNT DUE

INVOICE NUMBER	ADVERTISER INFORMATION			
	BILLING PERIOD END DATE	BILLED ACCOUNT NUMBER	PARENT ACCOUNT NUMBER	ADVERTISER / CLIENT NAME
1171601	10/15/13	10270		CC HEALTH DEPT (PO1401)

Boone County, Missouri Unofficial Document

THIS DEED, Made and entered into this 14TH day of JUNE, 2001, by and between

RANDY D. SAPP and DONNA RAE SAPP, husband and wife

of the County of Boone State of Missouri party or parties of the first part, and

JACOB E. WILLIAMS and DONNA H. WILLIAMS, husband and wife

5601 ARNOLD LANE ~~HARTSBURG, MO 65039~~

ASHLAND, Mo 65010

of the County of Boone State of Missouri party or parties of the second part.

WITNESSETH, that the said party or parties of the first part, for and in consideration of the sum of One Dollar and other valuable considerations paid by the said party or parties of the second part, the receipt of which is hereby acknowledged, does or do by these presents GRANT, BARGAIN AND SELL, CONVEY AND CONFIRM unto the said party or parties of the second part, the following described Real Estate, situated in the County of Boone and State of Missouri, to-wit:

A tract of land in the South Half (S1/2) of the Southeast Quarter (SE1/4) of Section 27, Township 46 North, Range 12 West described as follows: Beginning at the Southwest corner of a Survey recorded in Book 383, at Page 940 records of Boone County, Missouri, thence North 2 degrees 14 minutes West, 175 feet, thence North 87 degrees 46 minutes East, 155 feet, thence South 2 degrees 14 minutes East, 175 feet, thence South 87 degrees 46 minutes West 155 feet to the point of beginning.

5601 ARNOLD LANE ~~HARTSBURG, MO 65039~~

ASHLAND, Mo 65010

Subject to building lines, conditions, restrictions, easements and zoning regulations of record if any.

TO HAVE AND TO HOLD the same, together with all rights and appurtenances to the same belonging, unto the said party or parties of the second part, and to the heirs and assigns of such party or parties forever.

The said party or parties of the first part hereby covenanting that said party or parties and the heirs, executors and administrators of such party or parties, shall and will WARRANT AND DEFEND the title to the premises unto the said party or parties of the second part, and to the heirs and assigns of such party or parties forever, against the lawful claims of all persons whomsoever, excepting, however, the general taxes for the calendar year 2001 and thereafter, and special taxes becoming a lien after the date of this deed.

IN WITNESS WHEREOF, the said party or parties of the first part has or have hereunto set their hand or hands the day and year first above written.

Randy D. Sapp

RANDY D. SAPP
Donna Rae Sapp

DONNA RAE SAPP

STATE OF MISSOURI }
County of Boone } ss. On this 14TH day of JUNE, 2001, before me
personally appeared

RANDY D. SAPP and DONNA RAE SAPP, husband and wife
to me known to be the persons or person described in and who executed the foregoing instrument, and acknowledged that THEY executed the same as THEIR free act and deed.

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed my official seal in the County and State aforesaid; the day and year first above written.

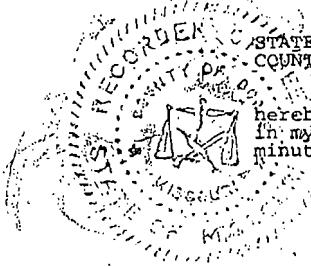
My term expires _____
Maureen A. Dalton

Notary Public



Boone County, Missouri
Unofficial Document

532



STATE OF MISSOURI)
COUNTY OF BOONE) SS.

Document No. 14307

I, the undersigned Recorder of Deeds for said county and state do hereby certify that the foregoing instrument of writing was filed for record in my office on the 18th day of June, 2001 at 9 o'clock and 39:03 minutes AM and is truly recorded in Book 1741 Page 531.

Witness my hand and official seal on the day and year aforesaid.

BETTIE JOHNSON, RECORDER OF DEEDS

By Vicki Gilpin deputy
Vicki Gilpin

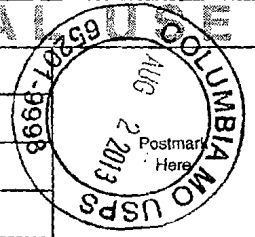
7012 340 0001 1282 3743

U.S. Postal Service™
CERTIFIED MAIL™ RECEIPT
(Domestic Mail Only; No Insurance Coverage Provided)

For delivery information visit our website at www.usps.com®

OFFICIAL USE

Postage	\$
Certified Fee	
Return Receipt Fee (Endorsement Required)	
Restricted Delivery Fee (Endorsement Required)	
Total Postage & Fees	\$



Sent To Jaube & Donna H Williams
 Street, Apt. No.;
 or PO Box No. 38530 Fairview Rd
 City, State, ZIP+4 Richland, MO 65556

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
 County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the following budget revision for Public Works to purchase Fleet Maintenance Software.

Department	Account	Department Name	Account Name	Decrease \$	Increase \$
2040	91700	Public Works – Main.	Grounds Improvement	39,000	
2040	92302	Public Works – Main.	Replacement Computer Software		39,000

Done this 19th day of November, 2013.

ATTEST:

Wendy S. Noren
 Wendy S. Noren
 Clerk of the County Commission

Daniel K. Atwill

Daniel K. Atwill
 Presiding Commissioner

Karen M. Miller

Karen M. Miller
 District I Commissioner

Janet M. Thompson

Janet M. Thompson
 District II Commissioner

Boone County Purchasing

Amy Robbins
Senior Buyer



613 E. Ash St., Room 109
Columbia, MO 65201
Phone: (573) 886-4392
Fax: (573) 886-4390

COPY

MEMORANDUM

TO: Boone County Commission
FROM: Amy Robbins
DATE: October 31, 2013
RE: RFP Award Recommendation: 33-03SEP13 – Fleet Maintenance Software

The Request for Proposal for 33-03SEP13 – Fleet Maintenance Software closed on September 3, 2013. Eight proposal responses were received.

The evaluation committee consisted of the following:

Greg Edington, Public Works
Cpt. Chad Martin, Sheriff's Department
Jane Telander, Public Works
Billy Way, IT
Rickey Harvey, Public Works

The evaluation committee recommends award to Collective Data, Inc. per their attached Evaluation Report.

Software and 1 st Year Maintenance:	\$53,945.00
2 nd Year Maintenance:	\$ 9,111.25
3 rd Year Maintenance:	\$ 9,111.25
4 th Year Maintenance:	\$ 9,475.20
5 th Year Maintenance:	\$ 9,475.20

Contract Grand Total: \$91,117.90

Invoices will be paid from Department 2040 – Public Works, Maintenance Operations, Account 92302 – Replacement Computer Software

ATT: Evaluation Report

cc: Proposal File / Evaluation Committee

000

53,945.00+
15,000.00-

38,945.00*+

COST
CURRENT BUDGET

Year	<u>2013</u>	Original Appropriation	<u>15,000.00</u>
Dept.	<u>2040 PW-MAINTENANCE OPERATIONS</u>	Revisions	<u> </u>
Acct.	<u>92302 REPLC COMPUTER SOFTWARE</u>	Original + Revisions	<u>15,000.00</u>
Fund	<u>204 ROAD & BRIDGE FUND</u>	Expenditures	<u> </u>
		Encumbrances	<u> </u>
Class/Account	<u>A ACCOUNT</u>	Actual To Date	<u> </u>
Account Type	<u>E EXPENSE</u>	Remaining Balance	<u>15,000.00</u>
Normal Balance	<u>D DEBIT</u>	Shadow Balance	<u>15,000.00</u>

Expenditures by Period

January	_____	July	_____
February	_____	August	_____
March	_____	September	_____
April	_____	October	_____
May	_____	November	_____
June	_____	December	_____

F2=Key Scr F3=Exit F5=Ledger Transactions F7=Transactions F9=Budget

Year	<u>2013</u>	Original Appropriation	
Dept	<u>2040 PW-MAINTENANCE OPERATIONS</u>	Revisions	<u>200,000.00</u>
Acct	<u>91700 GROUNDS IMPROVEMENT</u>	Original + Revisions	<u>200,000.00</u>
Fund	<u>204 ROAD & BRIDGE FUND</u>	Expenditures	
		Encumbrances	<u>131,995.44</u>
Class/Account	<u>A ACCOUNT</u>	Actual To Date	<u>131,995.44</u>
Account Type	<u>E EXPENSE</u>	Remaining Balance	<u>68,004.56</u>
Normal Balance	<u>D DEBIT</u>	Shadow Balance	<u>68,004.56</u>

Expenditures by Period

January	_____	July	_____
February	_____	August	_____
March	_____	September	_____
April	_____	October	_____
May	_____	November	_____
June	_____	December	_____

F2=Key Scr F3=Exit F5=Ledger Transactions F7=Transactions F9=Budget

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

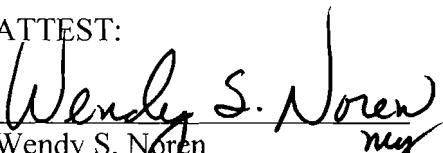
In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby award bid 33-03SEP13 – Fleet Maintenance Software to Collective Data, Inc. The terms of the agreement are stipulated in the attached Purchase Agreement. It is further ordered the Presiding Commissioner is hereby authorized to sign said Purchase Agreement.

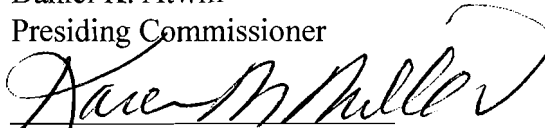
Done this 19th day of November, 2013.

ATTEST:

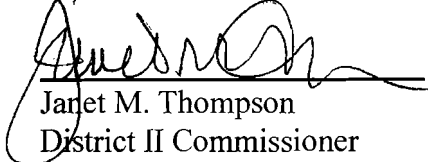

Wendy S. Noren
Clerk of the County Commission



Daniel K. Atwill
Presiding Commissioner



Karen M. Miller
District I Commissioner


Janet M. Thompson
District II Commissioner

*DO NOT UNSTAPLE THESE PAGES

*THE ONLY ACTION NEEDED IS TO WRITE THE COMM ORDER # ON THE FORM AND RETURN TO AUDITOR'S OFFICE.

518-2013

**PURCHASE REQUISITION
BOONE COUNTY, MISSOURI**

10/30/13

REQUEST DATE

VENDOR NO. Collective Data, Inc. 800-750-7638
 VENDOR NAME 230 2nd St. SE Ste. 414 Cedar Rapids IA 52401
 ADDRESS 230 2nd St. SE Ste. 414 CITY STATE ZIP

BID DOCUMENTATION

This field **MUST** be completed to demonstrate compliance with statutory bidding requirements. Refer to RSMo 50.660, 50.753-50.790, and the Purchasing Manual—Section 3

- | | | |
|--|---|--|
| <input checked="" type="checkbox"/> Bid /RFP (enter # below) | Not Subject To Bidding (select appropriate response below): | |
| <input type="checkbox"/> Sole Source (enter # below) | <input type="checkbox"/> Utility | <input type="checkbox"/> Mandatory Payment to Other Govt |
| <input type="checkbox"/> Emergency Procurement (enter # below) | <input type="checkbox"/> Employee Travel/Meal Reimb | <input type="checkbox"/> Court Case Travel/Meal Reimb |
| <input type="checkbox"/> Written Quotes (3) Attached (>\$2500 to \$4,499) | <input type="checkbox"/> Training (registration/conf fees) | <input type="checkbox"/> Tool and Uniform Reimb |
| <input type="checkbox"/> Purchase is <=\$2500 and is NOT covered by an existing bid or sole source | <input type="checkbox"/> Dues | <input type="checkbox"/> Inmate Housing |
| | <input type="checkbox"/> Pub/Subscription/Transcript Copies | <input type="checkbox"/> Remit Payroll Withheld |
| | <input type="checkbox"/> Refund of Fees Previously Paid to County | <input type="checkbox"/> Agency Fund Dist (dept #s 7XXX) |
| | <input type="checkbox"/> Professional Services (see Purchasing Policy Section 3-103); enter RFP if applicable | |
| | <input type="checkbox"/> Intergovernmental Agreement | |
| | <input type="checkbox"/> Not Susceptible to Bidding for Other Reasons (Explain): | |

#33-03SEP13
(Enter Applicable Bid / Sole Source / Emergency Number)

Ship to Department # 2040 Public Works Maintenance Operations

Bill to Department # 2040 Public Works Maintenance Operations

Department	Account	Item Description	Qty	Unit Price	Amount
2 0 4 0	9 2 3 0 2	CollectiveShop 5.5	1	\$18,495.00	\$18,495.00
2 0 4 0	9 2 3 0 2	Module 5.5 Active Directory	1	\$3,500.00	\$3,500.00
2 0 4 0	9 2 3 0 2	Data Import Script	1	\$10,000.00	\$10,000.00
2 0 4 0	9 2 3 0 2	Installation & Configuration Service	1	\$3,000.00	\$3,000.00
2 0 4 0	9 2 3 0 2	Module Mission Control Module	1	\$3,500.00	\$3,500.00
2 0 4 0	9 2 3 0 2	Manual Fuel Import – Fuel Master	1	\$1,500.00	\$1,500.00
2 0 4 0	9 2 3 0 2	Modification of base software or module	1	\$1,500.00	\$1,500.00
2 0 4 0	9 2 3 0 2	Part Kit Module	1	\$1,500.00	\$1,500.00
2 0 4 0	9 2 3 0 2	Training – On Site (Day 1)	1	\$3,000.00	\$3,000.00
2 0 4 0	9 2 3 0 2	Additional Training (Days 2-4)	3	\$1,500.00	\$4,500.00
2 0 4 0	9 2 3 0 2	VMRS Codes	1	\$950.00	\$950.00
2 0 4 0	9 2 3 0 2	Manual Maintenance Import – Enterprise License	1	\$2,500.00	\$2,500.00
					\$53,945.00

I certify that the goods, services or charges specified above are necessary for the use of this department, are solely for the benefit of the county, and have been procured in accordance with statutory bidding requirements.

Amy Robbins
 Prepared By
 Requesting Official

11/8/13
 Auditor Approval

Boone County Purchasing

Amy Robbins
Senior Buyer



613 E. Ash St., Room 109
Columbia, MO 65201
Phone: (573) 886-4392
Fax: (573) 886-4390

MEMORANDUM

TO: Boone County Commission
FROM: Amy Robbins
DATE: November 7, 2013
RE: RFP Award Recommendation: 33-03SEP13 – *Fleet Maintenance Software*

The Request for Proposal for 33-03SEP13 – *Fleet Maintenance Software* closed on September 3, 2013. Eight proposal responses were received.

The evaluation committee consisted of the following:

Greg Edington, Public Works
Cpt. Chad Martin, Sheriff's Department
Jane Telander, Public Works
Billy Way, IT
Rickey Harvey, Public Works

The evaluation committee recommends award to Collective Data, Inc. per their attached Evaluation Report.

Software and 1 st Year Maintenance:	\$53,945.00
2 nd Year Maintenance:	\$ 9,111.25
3 rd Year Maintenance:	\$ 9,111.25
4 th Year Maintenance:	\$ 9,475.20
5 th Year Maintenance:	\$ 9,475.20

Contract Grand Total: \$91,117.90

Invoices will be paid from Department 2040 – Public Works, Maintenance Operations, Account 92302 – Replacement Computer Software

ATT: Evaluation Report

cc: Proposal File / Evaluation Committee

Evaluation Report for Request for Proposal

33-03SEP13 – Fleet Maintenance Software

OFFEROR #1: TMW Systems – Chapel Hill, NC

It has been determined that TMW Systems has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

It has been determined that TMW Systems has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Unlimited # of users
- Response complies

Concerns:

- Does not meet 3.3.7.44; Not a fuel tax system; doesn't provide fuel tax information
- Licensing based on number of active assets tracked; \$4800 per each 50 inventory unit increment over 400.
- Doesn't track individual tires cradle to grave, only manufacturer and model
- No samples of training materials

Experience/Expertise of Offeror

Strengths:

-

Concerns

- No experience or previous reference information was provided; Response to Item 3.4.1. References For Training stated references would be made available if TMW is selected to move forward in the selection process
 - **Request references**
- BAFO response referenced incorrect RFP sections and only provided the name of one reference (Catawaba County, NC.) When we attempted to contact this reference the phone number provided was incorrect. We located the correct number ourselves but were told that the "primary contact" that TMW had listed no longer works for the company. When we attempted twice to contact the replacement contact we never received a call back.

OFFEROR #2: PSCS – Shreveport, LA

 X It has been determined that PSCS has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

 It has been determined that PSCS has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

-

Concerns:

- Cannot provide core requirements
- Few specialized inventory fields, requires user-defined fields
- Does not meet:
 - 3.3.7.4. Doesn't meet our specific needs.,
 - 3.3.7.5. No specific location field
 - 3.3.7.9. No alternate meter fields
 - 3.3.7.23. Other equipment field is nice, but may not work for alternator info
 - 3.3.7.35. Fuel economy not automatically displayed
 - 3.3.7.36. No Highway tax field
 - 3.3.7.44. No tax tracking
 - 3.3.7.50. does not track warranty by VMRS code
 - 3.3.7.51., 3.3.7.54., 3.3.7.55., 3.3.8.2., 3.3.10.5., 3.3.10.6-8, 3.3.10.10., 3.3.10.21., 3.3.11.3-4., 3.3.11.7-8., 3.3.12.1, 2, 5, 8, 7., 3.3.13.2., 3.3.13.5.

Experience/Expertise of Offeror

Strengths:

-

Concerns

- References not specific to this RFP

OFFEROR #3: Collective Data - Cedar Rapids, IA

X It has been determined that **Collective Data** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

_____ It has been determined that **Collective Data** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Support active directory single sign-on
- Web-based application
- Can track accidents and claims
- Meets all requirements of RFP scope section 3.0.
- Provided a succinct work plan and schedule for the project timeline

Concerns:

-

Experience/Expertise of Offeror

Strengths:

- 40% of client base is considered government clients and is largest single market niche
- 1000 installations and & 200 active supported contracts
- 96% positive support rating on customer satisfaction survey in 2012
- 90% client retention rate
- Provided relevant references (public entities)

Concerns

- Relatively young company (founded in 1997)

OFFEROR #4: Assetworks – Wayne, PA

 X It has been determined that **Assetworks** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

 It has been determined that **Assetworks** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Web based application
- Active Directory single sign on compatible

Concerns:

- 400 maximum active inventory units;
- **Question:** What constitutes definition of “unit” that is included in the 400 units. For example, would a vehicle equipped with a 2-way radio be considered as 2 units or 1 unit? Does software independently track sub-units?
 - BAFO response indicated that in the above example, the unit would be the vehicle and the radio would be a component of the vehicle. Components can be tracked separately and reassigned to other units

Experience/Expertise of Offeror

Strengths:

- Used in over 225 cities and counties as well as 28 of the 50 states
- Very large list of references
- 7 of 10 largest utilities in the US use application
- 6 of top 10 private commercial fleets use application (Hertz, Pepsi, Yellow, etc.)
- In business since 1993
- Many large Govt clients
- Company longevity

Concerns

- Very Specific implementation terms

OFFEROR #5: FleetSoft - Modern Business Computing, Inc. - Elgin, IL

X It has been determined that **Modern Business Computing, Inc.** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

_____ It has been determined that **Modern Business Computing, Inc.** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Compatible with FuelMaster and can be set to automatically import data from FuelMaster

Concerns:

- Will bill for travel costs for training
- 3.3.7.30 – Only offer 10 user defined fields for vehicles and 5 for parts/employees
- 3.3.12.6. – does not offer Part failure analysis
- 3.3.14.10. – no ability to create template work orders to use over and over again with a unlimited check
- 3.3.10.21. – cannot create parts kit by part number = not efficient
- Unclear if web-based or client-based

Experience/Expertise of Offeror

Strengths:

- All references long-standing customers with recent updates

Concerns

-

OFFEROR #6: Faster Asset Solutions (CCG Systems) – Virginia Beach, VA

 X It has been determined that **Faster Asset Solutions** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

 It has been determined that **Faster Asset Solutions** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Web-based application
- Unlimited user licenses

Concerns:

- 3.3.12.6. – Doesn't offer Part failure analysis natively; can be custom developed
- 3.3.14.25. – Dynamic searches saved as cookies and dependent on internal browser security settings
- Many criteria only met via additional custom reports = added cost

Experience/Expertise of Offeror

Strengths:

- Lots of varied references with large customers

Concerns

-

OFFEROR #7: Ron Turley Associates, Inc. = Glendale, AZ

It has been determined that **Ron Turley Associates, Inc.** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

It has been determined that **Ron Turley Associates, Inc.** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

-

Concerns:

- Doesn't support active directory (no single sign-on)
- 3.3.21.1-17 – No capabilities – would have to create ourselves through Crystal Reports
- 400 maximum active inventory units;
- Only quoted 5 concurrent users

Experience/Expertise of Offeror

Strengths:

-

Concerns

- Implementation not listed anywhere under description of services provided, only product/software training

OFFEROR #8: MHC Kenworth – Columbia, MO

 X It has been determined that **MHC Kenworth** has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

 It has been determined that **MHC Kenworth** has submitted a **non-responsive** proposal.

Method of Performance

Strengths:

- Web-based application

Concerns:

- Proposal is ambiguous as to what capabilities software meets. Response not tailored to RFP scope.

Experience/Expertise of Offeror

Strengths:

-

Concerns

- Lack of government references

Summary:

The evaluation committee initially met on September 16, 2013. After the primary evaluation of the eight responses submitted, the committee selected three Offerors, TMW Systems, AssetWorks and Collective Data, to short-list based on the minimum specification requirements. A Request for Clarification letter was sent to two of the three remaining Offerors (TMW Systems and AssetWorks) and the committee met again on September 25 to review the responses. TMW Systems only provided one reference for previous experience and the contact information was inaccurate. Once the contact information was confirmed, the reference party never returned our call after 2 attempts at contact were made. Having received an acceptable response from AssetWorks, the committee short-listed again to AssetWorks and Collective Data.

Following the Sept. 25 meeting, the remaining 2 Offerors were sent requests for interviews to include demonstrations of their software, both accepted. Interviews for both Offerors were held on October 7 after which the committee scored both as to Method of Performance and Experience/Expertise and it was determined that Collective Data's software most closely mirrored our requirements and was the best fit for the County. Having ruled out all other Offerors in this process, no Cost score was needed.

On October 25 a second interview was conducted with Collective Data to discuss viability of the County's data for import into the new software as well as finalizing total cost of the software. On September 28 the committee met a final time to review the data analysis and final quote provided by Collective Data. At this time, the Committee agreed to award the contract to Collective Data.

Recommendation for Award:

This evaluation report represents our subjective opinion of each Offeror's strengths and concerns and is based upon our analysis of the relevant facts, as contained in each Offeror's proposal.

We recommend that the County of Boone – Missouri award the contract for Fleet Maintenance Software to Collective Data of Cedar Rapids, IA in the amount of \$53,945.00.

**PURCHASE AGREEMENT FOR
Fleet Maintenance Software
Term and Supply**

THIS AGREEMENT dated the 19th day of November 2013 is made between Boone County, Missouri, a political subdivision of the State of Missouri through the Boone County Commission, herein "County" and **Collective Data, Inc.** herein "Contractor."

IN CONSIDERATION of the parties performance of the respective obligations contained herein, the parties agree as follows:

- Contract Documents** - This agreement shall consist of this Purchase Agreement for **Fleet Maintenance Software** in compliance with Request for Proposal number **33-03SEP13**, the Contractor's proposal response dated September 6, 2013, Collective Data Quote Number 3258.RFPV2 dated September 6, 2013 both executed by Sean Taylor on behalf of the Contractor and email from Sean Taylor regarding Revised Pricing dated October 28, 2013. All such documents shall constitute the contract documents which are attached hereto and incorporated herein by reference. Service or product data, specification and literature submitted with proposal response may be permanently maintained in the County Purchasing Office contract file for this Request for Proposal if not attached. In the event of conflict between any of the foregoing documents, this Purchase Agreement, the Request for Proposal with the County's Standard Terms and Conditions shall prevail and control over the Contractor's proposal response(s).
- Purchase** - The County agrees to purchase from the Contractor and the Contractor agrees to provide fleet maintenance software including annual support and updates for the **Boone County Public Works Office** as follows:

Qty	Item	Price	Extended Price
1	collectiveShop 5.5 Includes: 10 Concurrent Users 1-Year Support & Update PostgreSQL Database Full Editor Set	\$18,495.00	\$18,495.00
1	Module 5.5 Active Directory	\$ 3,500.00	\$ 3,500.00
1	Data Import Script	\$10,000.00	\$10,000.00
1	Installation and Configuration Service	\$ 3,000.00	\$ 3,000.00
1	Module Mission Control Module	\$ 3,500.00	\$ 3,500.00
1	Manual Fuel Import – Fuel Master	\$ 1,500.00	\$ 1,500.00
1	Modification of base software or module	\$ 1,500.00	\$ 1,500.00
1	Part Kit Module	\$ 1,500.00	\$ 1,500.00
1	Training – On Site (Day 1)	\$ 3,000.00	\$ 3,000.00
3	Additional Training – On Site (Days 2-4)	\$ 1,500.00	\$ 4,500.00
1	VMRS Codes	\$ 950.00	\$ 950.00
1	Manual Maintenance Import – Enterprise License	\$ 2,500.00	\$ 2,500.00
1st Year Software & Maintenance Total:			\$53,945.00
1	2 nd Year Maintenance	\$ 9,111.25	\$ 9,111.25
1	3 rd Year Maintenance	\$ 9,111.25	\$ 9,111.25
1	4 th Year Maintenance	\$ 9,475.20	\$ 9,475.20
1	5 th Year Maintenance	\$ 9,475.20	\$ 9,475.20
Total Cost of Contract:			\$91,117.90

3. **Contract Duration** - This agreement shall commence on the **date of agreement and extend through December 31, 2014** subject to the provisions for termination specified below. The maintenance portion of this agreement may be extended beyond the expiration date by order of the County for **four (4) additional one-year periods** subject to the pricing clauses in the Contractor's bid response and thereafter on a month to month basis in the event the County is unable to re-bid and/or award a new contract prior to the expiration date after exercising diligent efforts to do so or not.
4. **Billing and Payment** - All billing shall be invoiced to Boone County Public Works and billings may only include the prices listed within. No additional fees for delivery or extra services or taxes shall be included as additional charges in excess of the charges specified in the Contractor's quote. The County agrees to pay all invoices within thirty days of receipt. Contractor agrees to honor any cash or prompt payment discounts offered in its proposal response if county makes payment as provided therein. In the event of a billing dispute, the County reserves the right to withhold payment on the disputed amount; in the event the billing dispute is resolved in favor of the Contractor, the County agrees to pay interest at a rate of 9% per annum on disputed amounts withheld commencing from the last date that payment was due.
5. **Binding Effect** - This agreement shall be binding upon the parties hereto and their successors and assigns for so long as this agreement remains in full force and effect.
6. **Entire Agreement** - This agreement constitutes the entire agreement between the parties and supersedes any prior negotiations, written or verbal, and any other bid or bid specification or contractual agreement. This agreement may only be amended by a signed writing executed with the same formality as this agreement.
7. **Termination** - This agreement may be terminated by the County upon thirty days advance written notice for any of the following reasons or under any of the following circumstances:
- a. County may terminate this agreement due to material breach of any term or condition of this agreement, or
 - b. County may terminate this agreement if in the opinion of the Boone County Commission if delivery of products are delayed or products delivered are not in conformity with bidding specifications or variances authorized by County, or
 - c. If appropriations are not made available and budgeted for any calendar year.

IN WITNESS WHEREOF the parties through their duly authorized representatives have executed this agreement on the day and year first above written.

COLLECTIVE DATA, INC.

by Caroline Richman
title Business Manager

BOONE COUNTY, MISSOURI

BY: **BOONE COUNTY COMMISSION**
Daniel K. Atwill
Daniel K. Atwill, Presiding Commissioner

APPROVED AS TO FORM:

J. H. Hous
County Counselor

ATTEST:

Wendy S. Noren
Wendy S. Noren, County Clerk

AUDITOR CERTIFICATION

In accordance with RSMo 50.660, I hereby certify that a sufficient unencumbered appropriation balance exists and is available to satisfy the obligation(s) arising from this contract. (Note: Certification of this contract is not required if the terms of this contract do not create a measurable county obligation at this time.)

<u>Jane E. Pitchford</u>	<u>11/8/13</u>	<u>2040 / 92302 / \$53,945.00</u>
Signature <i>by cdf</i>	Date	Appropriation Accounts



CERTIFICATE OF LIABILITY INSURANCE

COLLE-6 OP ID: BA

DATE (MM/DD/YYYY)
11/05/2013

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).

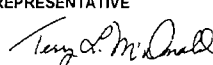
PRODUCER A W Welt Ambrisco Ins., Inc. 24 Westside Drive Iowa City, IA 52246 Terry L. McDonald CIC	CONTACT NAME:	
	PHONE (A/C, No, Ext):	FAX (A/C, No):
E-MAIL ADDRESS:		
INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED CollectiveData Carrie Ridenour 230 2nd St SE Suite 414 Cedar Rapids, IA 52401	INSURER A : Travelers	
	INSURER B : Accident Fund Company	
	INSURER C :	
	INSURER D :	
	INSURER E :	
INSURER F :		

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVP	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	GENERAL LIABILITY	X		ZPP12N60798	01/01/2013	01/01/2014	EACH OCCURRENCE \$ 1,000,000
	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY						DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000
	<input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR						MED EXP (Any one person) \$ 10,000
	<input checked="" type="checkbox"/> Professional						PERSONAL & ADV INJURY \$ 1,000,000
GEN'L AGGREGATE LIMIT APPLIES PER:							GENERAL AGGREGATE \$ 2,000,000
<input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC							PRODUCTS - COMP/OP AGG \$ 2,000,000
							\$
A	AUTOMOBILE LIABILITY			BA3398P650	01/01/2013	01/01/2014	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input type="checkbox"/> ANY AUTO						BODILY INJURY (Per person) \$
	<input type="checkbox"/> ALL OWNED AUTOS						BODILY INJURY (Per accident) \$
	<input checked="" type="checkbox"/> HIRED AUTOS <input checked="" type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS						PROPERTY DAMAGE (PER ACCIDENT) \$
							\$
A	UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR			ZUP12R29288	01/01/2013	01/01/2014	EACH OCCURRENCE \$ 1,000,000
	EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE						AGGREGATE \$ 1,000,000
	DED <input checked="" type="checkbox"/> RETENTION \$ 0						\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY		N/A	WCV6025581	01/01/2013	01/01/2014	<input checked="" type="checkbox"/> WC STATUTORY LIMITS <input checked="" type="checkbox"/> OTHER
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)						E.L. EACH ACCIDENT \$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below						E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
							E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Tech E & O Liabili			ZPP12N60798	01/01/2013	01/01/2014	Limit 1,000,000 Ded 10,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, If more space is required)
 Boone county Public Works
 see notes

CERTIFICATE HOLDER Boone County, MO 613 E Ash Street Columbia, MO 695201	BOOCLMO	CANCELLATION 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 

© 1988-2010 ACORD CORPORATION. All rights reserved.

NOTEPAD:

HOLDER CODE **BOOCLMO**
INSURED'S NAME **CollectiveData**

COLLE-6
OP ID: BA

PAGE 2
Date **11/05/2013**

If required by written contract Boone County, MO is automatically included as an additional insured on the General Liability.

A Third Party Notice of Cancellation has been endorsed in favor of Boone County, MO onto the Travelers, subject to State Law.

STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
2. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
3. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid.
4. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
5. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
6. The delivery date shall be stated in definite terms, as it will be taken into consideration in awarding the bid.
7. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
8. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
9. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
10. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
11. No bid transmitted by fax machine or **e-mail** will be accepted. **U.S. mail only.**
12. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
13. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms.
14. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the Federal Transit Administration's Best Practices Procurement Manual – Appendix A. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.

15. In the event of a discrepancy between a unit price and an extended line item price, the unit price shall govern.
16. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.



QUOTE

Boone County Public Works
 Greg Edington
 5551 Hwy 63 South
 Columbia, MO 65201

Quote #: 3258.RFPV2
 Date: 09/06/2013
 Expiration Date: 12/06/2013

Qty	Item	Price	Extended Price
1	collectiveShop 5.5 Includes : * 10 - Concurrent Users * 1- Year Support & Updates * PostgreSQL Database * Web Portal Access * Full Editor Set Additional Concurrent License Packs are available: Single Users: \$1,000 each 5-Packs of Users: \$3,500 each	\$18,495.00	\$18,495.00
1	Module 5.5 Active Directory Supports existing user management by allowing users to log into Collective Data software through Windows Active Directory authentication. Benefit from having one source for passwords, user deletion, etc. that are all updated and synced with Collective Data software automatically.	\$3,500.00	\$3,500.00
1	Data Import Script Extraction and Import of existing JetFleet Data Collective Data will agree to bring in the data from the sample databases for the fields already existing in our collectiveShop solution for a price of \$5500.00. Should the county need additional fields beyond Collective Data's standard fields we will determine additional costs beyond above quoted amount.	\$10,000.00	\$10,000.00
1	Installation and configuration Service Configuration Services Remote configuration of Security Profiles settings templates as based on client requirements. Assistance and consulting on workflow set up based on client process. Addition of up to 5 additional fields to accomidate needs of the county.	\$3,000.00	\$3,000.00
1	Module Mission Control Module The Mission Control Module is a powerful dashboard-style view that allows a user to manage various aspects of the fleet operation in one place. Users will see a summary of important key performance indicators that they can take action on with ease.	\$3,500.00	\$3,500.00
1	Manual Fuel Import - Fuel Master The manual Fuel Master fuel import is a valuable add-on that allows you to import your Fuel Master transaction data into your Collective Data software. This ensures fuel log records are accurate and eliminates extra data entry.	\$1,500.00	\$1,500.00
1	Modification of base software or module Mech Availability via Web Portal for Maintenance Requests Prospect would like to have a quote to enhance collectiveShop to add the capability for the user to see availability to schedule work via the maintenace request or as a seperate view. The system would ideally allow the user to select a day and based on that selection it would allow the user to see what times are open for that tech to bring in the vehicle for the repair. Also give the fleet folks the ability to review and create and schedule the work order and block off appropriate time based on the request.	\$1,500.00	\$1,500.00
1	Part Kit Module	\$1,500.00	\$1,500.00



QUOTE

Quote #: 3258.RFPV2
Date: 09/06/2013

* Allows you the ability to set up predefined 'kits' of parts. Once these are set up, they can be added to a Work Order with an easy click of a button.

1	Training - On Site Training at Customer Premises	\$3,000.00	
3	(Additional) Training - On Site Training at Customer Premises	\$1,500.00	\$7,500.00
	- Consecutive Days of On-Site End User Training. Includes all travel expenses.		
	- Training to be scheduled after final delivery of user system with a 2 week minimum lead time.		
	- Final payment must be received prior to scheduling on site training.		
	- Must use training services with 12 months.		
	- Includes a two (2) hour web training session for each consecutive on-site training day, to be used within six months of the on-site training.		

Final day of training will be geared toward IT Staff for the county where they will learn to manage an use the:

- * Report Editors
- * Security Editors
- * Import Editors
- * Desktop Editors
- * General System Administration

1	VMRS Codes	\$950.00	\$950.00
	Configure and preload VMRS codes for Part Failure, Repair, Repair Reason, and VMRS Work Accomplished		
1	Manual Maintenance Import - Enterprise	\$2,500.00	\$2,500.00
	Enterprise license for the Maintenance Request link on Web Portal		
	The manual Enterprise Maintenance import is a valuable add-on that allows you to input your Enterprise Work Order transaction data into your Collective Data software. This ensures that maintenance history records are accurate and eliminates extra data entry into the Collective Data software system.		

Grand Total **\$53,945.00**

Quotation prepared by:
Sean Taylor
staylor@collectivedata.com
319-362-1993 x2115
FAX: 319-364-4306

To accept this quotation, please sign and fax to 319-364-4306

Print Name: _____

Signature: _____



QUOTE

Quote #: 3258.RFPV2
Date: 09/06/2013

Thank you for your business!

- * All projects are prioritized based on the date that payment is received.
- * By signing this document, the signer is committing to purchase the products and services listed in this quote and agreeing to the payment terms listed in this quote. The signer also acknowledges the authority to sign this document on behalf of the organization listed.
- * Collective Data offers software Lease Financing Options through Marlin Leasing. Ask your sales representative about how to purchase your software now and pay for it over time. Leasing options available up to 36 months.
- * All training requires advanced payment prior to scheduling the date. Price quoted reflects training fees only. Onsite training must be scheduled a minimum of 2 weeks in advance. Additional fees may apply to travel outside of the continental United States and Canada.
- * A signed and dated support and maintenance agreement is required at the time of final delivery. Technical support is available to clients with an in-force, signed maintenance agreement on file. The first year of support is included in the original purchase price and support renewals are quoted one year after initial installation. Maintenance renewals are based on two options:
 - Standard Support = 15% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, and complete access to client care webinars and our online knowledge database. Support renewal is calculated at 15% of List Price plus any new customizations/ongoing Imports/etc. that may be added after initial sale. Excludes training, hardware or one time Imports.
 - Premium Support = 25% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, two hours of web conference training, complete access to client care webinars and our online knowledge database, and Supported Version Guarantee. This means you will always be on a supported version (EX we are on version 5.5, if we jump to 6.0 and decide to no longer support 5.5, then with this support agreement option you would get upgraded free of charge and your new support cost would be based on the software price at that time, doesn't include any new add on's that you might request, one base system). Support renewal is calculated at 25% of List Price plus any new customizations/ongoing Imports/etc. that may be added after initial sale. Excludes training, hardware or one time Imports.
- * Optional items are not included in the total.
- * The quote expires on the date of expiration listed at the top of this quote.
- * Standard Payment Terms: 75% of total price of software and services listed on the purchase agreement are invoiced upon receipt of signed agreement, remaining 25% of listed amount will be invoiced upon delivery. All projects are prioritized based on payment received date.
- * Collective Data software natively supports the following database servers: PostgreSQL, MS SQL 2005, and 2008. No additional licensing is required to operate with PostgreSQL. Licensing for MS SQL is not included and is the responsibility of the Customer.

230 2nd ST SE, STE 414 * Cedar Rapids, IA 52401 * PH: 319-362-1993 * FAX: 319-364-4306

Amy Robbins - Re: Revised Pricing

From: Sean Taylor <staylor@collectivedata.com>
To: Amy Robbins <arobbins@boonecountymo.org>
Date: 10/28/2013 6:59 PM
Subject: Re: Revised Pricing

Good evening Amy,

Below is the adjustment to our bid response based on the revised pricing:

6.8. On-Going Software Maintenance

2nd Year \$ 9,111.25

3rd Year \$ 9,111.25

4th Year \$ 9,475.20

5th Year \$ 9,475.20

All support costs are based on the submitted configuration and may increase or decrease based on the final solution or additional modules or configurations to the solution in the future.

This is based on a support base of \$36,445.00. Support is not charged on Data Imports or Training. Let me know if you have any questions.

Enjoy your evening.
Sean

On Mon, Oct 28, 2013 at 4:22 PM, Amy Robbins <arobbins@boonecountymo.org> wrote:

Sounds great, thank you!

Amy Robbins
Senior Buyer
Boone County Purchasing
613 E. Ash St. Room 109
Columbia, MO 65201
Phone [573-886-4392](tel:573-886-4392)
Fax [573-886-4390](tel:573-886-4390)
Email: arobbins@boonecountymo.org

Check out our web page at: www.ShowMeBoone.com

>>> Sean Taylor <staylor@collectivedata.com> 10/28/2013 4:19 PM >>>

Hi Amy,

No problem I should be able to get that to you by the morning.



RFP Response,
Software Proposal:
RFP #33-03SEP13
Boone County-
Missouri

Sept 6, 2013

Collective Data, Inc.
230 2nd St. SE Ste. 414
Cedar Rapids, IA 52401
800-750-7638
Sean Taylor
staylor@collectivedata.com

Table of Contents

A. COVER PAGE	3
COLLECTIVE DATA.....	3
B. COMPANY BACKGROUND:.....	4
C. PROJECT WORK PLAN & SCHEDULE:.....	5
D. SYSTEM DESCRIPTION & FUNCTIONALITY	6
SYSTEM DESCRIPTION.....	6
SYSTEM FUNCTIONALITY	6
<i>Easy to navigate.</i>	6
<i>Enhanced User Control</i>	6
<i>Work Order Management:</i>	6
<i>Vehicle Management:</i>	7
<i>Module Design:</i>	7
<i>Parts Management:</i>	7
<i>Fuel Management:</i>	7
<i>Department & Location Tracking:</i>	7
<i>Reporting:</i>	7
<i>Web Portal:</i>	8
<i>System Security:</i>	8
<i>Risk Management:</i>	8
E. ANNUAL SOFTWARE AND MAINTENANCE, UPDATES & SUPPORT:.....	8
<i>What's included in support?</i>	8
<i>Cost Proposal & Response Pricing Page</i>	9
G. COLLECTIVE DATA REFERENCES	11
H. EXHIBIT A: FLEET MANAGEMENT SYSTEM FEATURES.....	12
I. SYSTEM REQUIREMENTS	12
J. SAMPLE CONTRACT & INSURANCE	12
K. ADDITIONAL DOCUMENTATION	12

A. Cover Page

Collective Data

Collective Data is pleased to respond to the Boone County's RFP for Fleet Management System Software. The following pages are designed to express our interest in working with the county to provide an industry leading solution that will meet your needs today and well into the future.

Company: Collective Data

Company Representative:

Address:

Phone:

e-mail:

Sean Taylor, Sr. Sales Consultant

230 2nd St SE, Ste 414

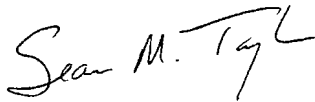
Cedar Rapids, IA 52401

800-750-7638 | 319-540-0388 (m)

staylor@collectivedata.com

Collective Data is excited to present you with the following proposal for our collectiveShop solution and look forward to working with the Boone County.

Signed:



Sean M. Taylor
Sr. Sales Consultant

B. Company Background:

Collective Data, originally founded as Champion Software in 1997, adopted the new name Collective Data in 2001 to better reflect the broad data management capabilities of its software products. Since its inception, Collective Data has worked to stay true to their promise of delivering:

- The most flexible and configurable product available
- The most productivity-gaining software for the investment
- The best blend of intuitiveness with features
- Expandable to replace more laborious systems
- Scalable to accommodate changes and growth
- Completely integrable with other systems/data
- Backed up by a customer-focused support and services team

All software products, including our proprietary application platform and all configured applications are completely written and supported by software designers and developers whom are employed in our corporate offices in Cedar Rapids, Iowa.

All Collective Data team members must have a strong passion for the unique product offerings we provide and the superior client focus and service we strive for. Our goal is to see our clients succeed with each and every endeavor they elect which involves Collective Data technology or applications.

Collective Data has deployed over 150 systems based on our latest core technology, and over 1000 systems throughout the history of our company. Although we service a multitude of markets, nearly 32% of our clients are State and Local Governments. The advanced core technology our software is built around provides a unique opportunity for our clients to deploy a system as an out-of-the-box solution, or to highly modify the system without sacrificing the ability to upgrade to newer systems when they come available.

Innovative software design combined with an experienced quality assurance and delivery staff means fewer technical problems. The stability of our software, the relatively straightforward installation process, and a support staff committed to providing accurate solutions the first time has been the hallmark of our service philosophy. Our clients consistently give us superior ratings in our client satisfaction surveys.

In our latest client survey, current clients using our latest generation software gave our support staff and service a 96% approval rating. Likewise, of all of our current clients, we have a retention rate over 90%.

Our goal is to see our clients derive the maximum benefit from our software. Our commitment to that goal drives us to provide a stable product using current technology,

highly trained, client focused support staff and a passion for solving challenges that asset-driven organizations face on a daily-basis.

Collective Data provides Fleet & Asset Management solutions to various industries throughout the world. We also provide support services for our products, training services, custom module creation, report & import creation services. Approximately 40% of our client base is considered government clients and is our largest single market niche. While we have over 1000 installations of our software we currently have approximately 200 clients on active support contracts.

C. Project Work Plan & Schedule:

See Attached Project Timeline Estimate Boone County RFP

Collective Data will be assigning Jon Sullivan as our lead project manager for this project. Jon will coordinate project status updates and internal list of outstanding tasks and time lines. Jon will also coordinate all internal Collective Data resources to ensure the successful implementation of CollectiveShop.

Project Kickoff Meeting (1-5 days after executed contract is received by Collective Data or when specified by the Boone County)

- The project kick off meeting will be scheduled to discuss the items below. It is anticipated this meeting will not last more than 1 hour and will require the project coordinator and IT contact from the Boone County. In addition to our Project Manager Jon Sullivan and Abby Briney- Client Care Manager (AM) will be in attendance for Collective Data.
- Introductions to Abby Briney who will be assigned Account Manager for the Boone County and communicating on an ongoing basis with the Boone County as a post implementation contact.
- Establish items needed to move forward with the project plan from Boone County and Collective Data.
- Establish necessary data files needed from Boone County for development of the application. Collective Data will need copies of the files to be imported. This information will be required in order for Collective Data to complete this functionality.
- Discuss configurations and deployment time lines for delivery. To ensure all functionality is developed correctly, Collective Data will verify each configuration and establish a meeting with the Collective Data development team to discuss final specs and adjustments for final configuration (if needed).
- Address any questions from Boone County and set next communications meeting time.

D. System Description & Functionality

System Description

collectiveShop™

A comprehensive fleet management system that's geared toward **improving productivity in internal shop operations with multiple technicians**. Manage all work, the status of that work, improve communication, and make managing a complex shop operation easy.

System Functionality

Easy to navigate.

An easy-to-use navigation system throughout the software makes it simple to find records, perform tasks, and enter data even when dealing with thousands of pieces of equipment.

The “quick find” feature works just like Google... as you type, all relevant records are displayed to help you find what you're looking for. Shortcut buttons also make it easy to navigate from one section of the software to another.

Enhanced User Control

Collective Data provides you with many tools to let your IT Staff shine. Report, Security, Import, and Desktop editors are all at your fingertips. You and your staff can manage the building of new reports, setting up security profiles and managing your system over time as your needs change.

Work Order Management:

collectiveShop's work flow management allows you to see what is going on in your shop at all times. You can filter by employee, status, or completion. See who has capacity to handle an emergency down situation. Your Mechanics will have a simple easy to use interface that is designed with touch screen in mind. Most technicians are in and out of the software in less than a minute without sacrificing you needs for essential data or extensive training on the system. Manage the interaction between your parts room and your technicians

Vehicle Management:

Manage all your vehicles by department, birth certificate, title information, responsible parties' even attachments and upfitting all in one area. Set up PM schedules and inspections based on grouping or individual equipment type. Manage your vehicle disposal process and lifecycle management. With collectiveShop's configurable reporting you can configure your analytics to your current methodology. Manage your vehicle throughout its entire lifecycle with the city.

Module Design:

All software products, including our proprietary application platform and all configured applications are completely written and supported by software designers and developers whom are employed in our corporate offices in Cedar Rapids, Iowa. Collective Data also has the ability to custom configure solutions to meet your existing or future needs.

Parts Management:

Collective Data products come with a fully integrated Part Management Module as part of the base package. Manage a single part room or multiple parts warehouses. With comprehensive tools and reporting you can manage your minimum and maximum stock levels by location, identify alternate or cross reference parts, manage part core charges or warranties with notification to technicians when they apply on any given work order.

Fuel Management:

Input your fuel data from any fueling source and track efficiency, watch for trends on fuel consumption or bill back fuel usage by department.

Department & Location Tracking:

Align your equipment with the department that has budget responsibility. Have the ability to report back costs and information by department. collectiveShop also gives you the ability to report on usage and manage fleet assignment and department or fleet rightsizing opportunities.

Reporting:

Collective Data's reporting tools allow you to select from over 100 stock reports, use our ad hoc reporting tools or custom build reports with our Reporting Editor. Just like our software you can use our "quick find" feature to filter results. Without having to build several versions of the same report you can quickly analyze how many of a particular brand is performing vs. the entire fleet. Separate out your costs by department assignment and distribute them through our Split and email feature. Reports can be printed, saved or emailed as a PDF or exported to CSV.

Web Portal:

collectiveShop comes standard with our Web Portal. This allows your users to access the most commonly used areas of the system via a web page. You can access with any device with an active internet connection and web browser. Access areas relating to:

- Maintenance Requests
- Reporting
- Meter Updating
- Equipment
- Parts Management
- Work Orders

System Security:

The software is designed to allow you to assign security rights by job function and location. Any area of the system can be restricted from access or by location. This allows you to manage the work flow and enhance ease of use by not making available items that are not relevant to the job function performed by the user.

Risk Management:

collectiveShop comes standard with a risk management suite that allows you to comprehensively track Accidents and Claims, Traffic Violations and Workplace Incidents. In conjunction with reporting you now have a method to enforce your policies as they relate to various risk management metrics.

E. Annual Software and Maintenance, Updates & Support:

Collective Data strives to provide the best customer support possible. We're dedicated to fixing any issues that may arise in the implementation of an enterprise software solution. And it shows. We received a **96% positive support rating** on our customer satisfaction survey last year.

What's included in support?

Technical Support is included for the first year with your purchase at our premium level.

- All product maintenance updates and upgrades
- Telephone support, 8-5 PM CST Monday-Friday
- E-mail support: support@collectivedata.com
- 24-hour online Knowledge Base and webinar videos:
 - <http://support.collectivedata.com>
- Assistance through remote diagnosis tools:
 - (GoToMeeting, RDP, Citrix Client)
- Provide support related documentation on request
- 2 hours of free web-based training depending on the software you purchase.

Maintenance renewals are based on two options:

- **Standard Support** = 15% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, and complete access to client care webinars and our online knowledge database. Support renewal is calculated at 15% of List Price plus any new customizations/ongoing Imports/etc. that may be added after initial sale. Excludes training, hardware or one time Imports.

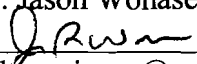
- **Premium Support** = 25% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, two hours of web conference training, complete access to client care webinars and our online knowledge database, and Supported Version Guarantee. This means you will always be on a supported version (EX: we are on version 5.5, if we jump to 6.0 and decide to no longer support 5.5, then with this support agreement option you would get upgraded free of charge and your new support cost would be based on the software price at that time, doesn't include any new add on's that you might request, one base system). Support renewal is calculated at 25% of List Price plus any new customizations/ongoing Imports/etc. that may be added after initial sale. Excludes training, hardware or one time Imports.

Attached is a copy of our Support Agreement for your review.

F. Cost Proposal & Response Pricing Page

A full pricing proposal has been attached for your review. The excerpt below is a breakdown of the costs of the proposed system based on requirements in Exhibit A.

In compliance with this Request for Proposal and subject to all the conditions thereof, the Offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: Collective Data
Address: 230 2nd St. SE, Ste 414
Cedar Rapids, IA 52401
Telephone: 800-750-7638 Fax: 319-364-4306
Federal Tax ID (or Social Security #): 39-1889090
Print Name: Jason Wonase Title: President
Signature:  Date: 9/4/13
E-Mail Address: jason@collectivedata.com

Item #	Description	Quantity	Unit Price	Extended Total
6.1	Base Software Package including installation & implementation	1	\$ 52430*	\$ 52430*
6.2.	Hardware: Barcode Printer (<i>if County's current Dymo LabelWriter 400 Turbo label printer is not compatible</i>)	1	\$	\$
6.3.	Hardware: Handheld Data Collection Device (scanner)	1	\$	\$
6.4.	Data Import/Conversion	1	\$ 10,000	\$10,000
6.5.	Training	1	\$ 7,500	\$ 7,500
6.6.	First Year Software Maintenance	1	\$ included	\$included
6.7.	TOTAL			\$ 69,930

* A full breakdown of our pricing proposal is attached as well as an optional item for our Auto Email Task Notification Module priced at \$2,500. Any modules can be split out and added at a later time with no disruption in services. We have included modules based on the requirement of Schedule A, if not all requirements are necessary Collective Data can consult with you on which functionality can be removed and still meet your functional requirements.

6.8. On-Going Software Maintenance

2nd Year \$ 13,107.50

3rd Year \$ 13107.50

4th Year \$ 13762.90

5th Year \$ 13762.90

All support costs are based on the submitted configuration and may increase or decrease based on the final solution or additional modules or configurations to the solution in the future.

6.9 Purchasing Cooperative:

Will you honor the submitted prices for purchase by other entities in Boone County who participate in cooperative purchasing with Boone County, Missouri?

Yes- for the exact same configuration for a period of 1 year.

G. Collective Data References

City of O'Fallon Missouri
John Griesenauer
636-379-5501
jgriesenauer@ofallon.mo.us

Date of Contract: 12/31/12
Length of Contract: 1 yr with annual renewals
Description of prior services:
collectiveShop 5.5, Auto Email, Predefined parts & labor, Exception reporting, VMRS codes, & Parts kit modules. Training Services

City of Jonesborough
Gary Lykins
423-753-1002
G_lykins@embarqmail.com or fleet1779@yahoo.com

Date of Contract: 6/4/07
Length of Contract: 1 yr with annual renewals
Description of prior services:
collectiveShop 5.5, Petro/Phoenix Fuel Import Training Services

City of Raleigh Police
Lawrence Cullipher
919-996-1149
Lawrence.cullipher@raleighnc.org

Date of Contract: 6/14/05
Length of Contract: 1 yr with annual renewals
Description of prior services:
collectiveFleet 5.5, Object Revolution, Predefined Parts & Labor and Part kit modules.
Training Services

H. Exhibit A: Fleet Management System Features

See attached Completed Exhibit A by Collective Data in response to section 3.3 Scope of Work.

I. System Requirements

See Attached Exhibit B for hardware requirements.

J. Sample Contract & Insurance

Collective Data is able to comply with the Insurance requirements as presented in the RFP and will provide an Insurance certificate upon award of the RFP. Attached for your review is a copy of our ELUA (Exhibit G) and Support Agreements (exhibit H).

K. Additional Documentation

Exhibit D- Detailed Pricing Breakdown
Executed e-Verify Documentation as requested

Exhibit A
Collective Data response to RFP #33-03Sep13

3.0 SCOPE OF SERVICES Responses by Collective Data

3.3 Scope of Services:

3.3.1. The system must be a real-time application, thus updating all files as the transaction occurs, not in a batch mode. However, electronic fuel transfers will operate in a batch mode. The system must be fully integrated, thus no data will be entered separately into two different software modules.

Collective Data is recommending our collectiveShop solution which is a client server solution with a real time Web Portal to allow for data entry at multiple entry points simultaneously.

3.3.2. All data from current system must be extracted and imported into the new Fleet Maintenance Software. The cost for such extraction and importation shall be noted on the corresponding line on the Pricing Page.

Collective Data has addressed this as part of the pricing proposal

3.3.3. Preferred Platform for Software

3.3.3.1 Vendor must specify preferred server platform and hardware requirements within proposal response.

collectiveShop is designed for the Windows platform. See Exhibit B for additional information on requirements and recommendations.

3.3.3.2 Must be compatible with and function within an MS Active Directory network environment

collectiveShop with Active Directory module will work with the MS Active Director network environment.

3.3.4 Software Licensing Requirements

3.3.4.1 At least two administrative seats and five service technicians. Vendor shall state whether software license is concurrent usage or per computer. Software license terms must be for the lifetime of the software.

collectiveShop is licensed concurrently. The base software comes with 5 concurrent users. Collective Data is recommending 10 concurrent licenses for your implementation. Additional licenses can be obtained at any time at an additional cost. Attached is Exhibit G for EULA and Exhibit H Support Agreement. The software is purchased as a perpetual license with annual options to renew support.

3.3.5. System Features

3.3.5.1. On-Line Help. The software must have context sensitive help that can be easily accessed using a function key. This must include comprehensive documentation that includes reports, data entry and display screens.

collectiveShop had extensive online help that can be displayed as a PDF or HTML.

3.3.5.2. Print-it Feature. The software must have the capability of viewing all reports on the screen, then choosing or not choosing to print the report. The user must be able to view the entire report by either condensing the size of the print on the screen or by using designated keystrokes to move up/down, right/left.

collectiveShop is compliant with the above requirement. collectiveShop has the ability to do print preview, print, export to PDF or email via PDF or export to CSV. All reports are also filterable to allow you to search for elements within the report and print or distribute a subsection of the report.

3.3.5.3. User Security. The software must have an optional security system by user ID and password. Each user ID has access to functions in the system they are given rights to.

collectiveShop comes with the ability for the administrators to create unlimited security profiles. Each profile can be defined by location or department to restrict access to just the group of vehicles they are responsible for, by section, tab or field within the software as well as determining the type of rights each person has within each area or field.

Exhibit A
Collective Data response to RFP #33-03Sep13

3.3.5.4. Management Security. If the optional user security is turned off, there must be management security passwords protecting mechanic wage information, purge functions and system parameter options from general access.

collectiveShop security profiles can accommodate this request.

3.3.6. System Parameters

3.3.6.1. The software must have a number of system parameters designed to allow the user to define certain features and to determine if a number of these features will be used. The following parameters should be included:

a. Customer Billing. Option allows customers to have their own labor, tires, and parts markups, and tax rates

This functionality is available with our CRM module.

b. Work Order Reason Codes. Option allows the user to track the reason a work order is opened; user definable up to 99 codes.

collectiveShop has the ability for the system to manage unlimited user defined Work Order Reason Codes.

c. Shop Codes on WO's. Option allowing the user to assign shop numbers on a work order.

Base functionality within collectiveShop.

d. Part Pick List. Option compiles a list of parts needed for preventative maintenance and other repairs that will print with the work order.

Required functionality is part of our Predefined Parts and Labor module.

3.3.7. Vehicle Inventory

3.3.7.1. At least an 8 Character Alphanumeric Vehicle Number -Yes

3.3.7.2. At least a 4 Character Alphanumeric Department Field -Yes

3.3.7.3. Yr., Make, Model Fields -Yes

3.3.7.4. Vehicle Size Classifications: L=Light , M=Medium, H=Heavy, T=Trailer, O=Other
Yes

3.3.7.5. Location – at least a 20 Digit Alphanumeric Field -Yes

3.3.7.6. Registration Number (Fixed Asset Number) -Yes

3.3.7.7. Serial Number -Yes

3.3.7.8. Main Odometer Unit Selection of: Miles, Hours, Units, Kilometers, or Gallons -Yes

3.3.7.9. Each vehicle can be assigned up to 4 alternate meters. -Yes with configuration

3.3.7.10. Purchase Date - Yes

3.3.7.11. In-Service Date - Yes

3.3.7.12. Engine Make – Yes

3.3.7.13. Engine Model – Yes

3.3.7.14. Transmission Make- Yes

3.3.7.15. Transmission Model –Yes

3.3.7.16. Tons –Yes

3.3.7.17. Front Axle- Yes

3.3.7.18. Wheel Size – Yes

3.3.7.19. Tire Size –Yes

3.3.7.20. Tire, ply, etc. –Yes

3.3.7.21. Unit GVW – Yes

3.3.7.22. Wheel Base - Yes

3.3.7.23. Alternator Make, Alternator Amps – Yes

3.3.7.24. Brake - Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

- 3.3.7.25. Steering - Yes
- 3.3.7.26. Spec Body Make, Spec Body Model, Spec Equipment – Yes
- 3.3.7.27. Purchase Price, Current Value, Trade in Value - Yes
- 3.3.7.28. Licensing, Insurance, and Depreciation fixed cost fields - Yes
- 3.3.7.29. License Expiration – Period - Yes
- 3.3.7.30. System shall carry unlimited user defined designated fields for unit and class - Yes
that also offer non access security read. – Yes through security settings
- 3.3.7.31. Oil Part Number and Quart Capacity - Yes
- 3.3.7.32. Transmission Fluid Part Number and Quart Capacity - yes
- 3.3.7.33. Tire Count/Max - yes
- 3.3.7.34. Service Notes: Minimum of 60 Characters to print on PM Due Report - Yes
- 3.3.7.35. Tank Capacity, Vehicle Average MPG - Yes
- 3.3.7.36. Highway Tax – Yes with Trip Module
- 3.3.7.37. PM scheduling for over 100 types of PM's specific to each vehicle - Yes
- 3.3.7.38. PM scheduling by time and/or miles, hours, kilometers, units, gallons and alternate meters - Yes
- 3.3.7.39. PM part kit identification number for each PM – Yes, with Part Kit module
- 3.3.7.40. The ability to include 1 PM or more within another (nesting). -Yes
- 3.3.7.41. State Inspection Scheduling - Yes
- 3.3.7.42. The ability to assign unlimited pieces of equipment to a vehicle. For example CB Radios, Wheel Chair Lifts, ect. - Yes
- 3.3.7.43. Unlimited notes attached to each vehicle - Yes
- 3.3.7.44. The ability to track fuel taxes on a vehicle – Yes with IFTA module
- 3.3.7.45. The ability to display the vehicle/equipment master record by vehicle number, VIN number, registration number or license plate number. - Yes
- 3.3.7.46. A vehicle's facility, department, number, class, or location can be changed at any time. All history must be transferred with the vehicle. - Yes
- 3.3.7.47. A vehicle's customer number may be changed at any time. All repair history must remain with the customer assigned at the time the repair is done. - Yes
- 3.3.7.48. Any vehicle master record can be copied to another so only information that is different will need to be entered. (Optional) – Yes- Cloning option
- 3.3.7.49. A vehicle warranty system must be available to track bumper-to-bumper warranties. - Yes
- 3.3.7.50. The vehicle warranty system must also track component warranties by VMRS code, for original equipment warranties, dealer extended warranties, or repairs done by outside vendors. Enter hours/miles and/or months of warranties. - Yes
- 3.3.7.51. The vehicle warranty system must integrate with the system's work order process by immediately flagging warranty repairs. - Yes
- 3.3.7.52. The system must have an odometer change routine that is used when an odometer breaks or rolls over. This routine allows the system to track the life miles of a vehicle even if the odometer reading is different. - Yes
- 3.3.7.53. The odometer change routine automatically adjusts and updates the preventative maintenance schedule for a vehicle. - Yes
- 3.3.7.54. Preventative maintenance due reports can sort on vehicle number, vehicle location, and vehicle department fields. Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

3.3.7.55. Preventative maintenance reports can be selected to print or view PM's due within a specified date range. Yes

3.3.7.56. Preventative maintenance reports can be selected to print all PM levels due or a single PM level. – Yes filtering

3.3.7.57. Preventative maintenance due reports can be selected on: past due, now due, due within the next "X" days, and/or next X miles, hours, or gallons. – Yes

3.3.7.58. The system can print and e-mail preventative maintenance notification cards. – Yes reminder emails can be sent or optional Auto Email module can be employed.

3.3.7.59. PM completion is automatically posted through the Work Order Module and/or by a special posting routine. – Yes data is updated in real time.

3.3.8. Vehicle Cost Reports

3.3.8.1. Repair history reports are available that can be sorted by department or vehicle and by a range of repair codes and dates. It will print major repair categories and list detail repair data that includes the description, parts and labor costs, for each vehicle. Yes

3.3.8.2. The repair history report will summarize parts and labor cost totals and percentages of expenditure for each major repair category. It will also print the cost per mile of each major repair code for the current period, year-to-date, or life-to-date of the vehicle. Yes

3.3.8.3. Cost per mile/hour reports are available by dept., vehicle, or make/yr. Prints period, year-to-date, life-to-date figures. Prints cost per mile/hour for tires, maintenance, miles per quart of oil. Prints license, insurance, depreciation expenses and fixed cost per mile, miles/hours per gallon. Yes

3.3.8.4. The cost per mile/hour reports produce totals for the range of vehicles specified and sub-totals for each department. (Optional) Yes

3.3.8.5. **Total Cost Reports.** Sorts by department, and/or vehicle. Prints period, year-to-date, life-to-date figures. Prints miles driven, gallons of fuel consumed, oil usage, tire cost, labor hours and cost, outside repairs, total repair costs, total maintenance cost, breakdowns, and utilization. Can group costs by repair reason or type. Yes

3.3.8.6. **Fleet Cost Reporting.** Calculates burdened hourly shop labor rate using data collected such as direct labor hours plus user-defined data of other costs. Yes

3.3.9. Fuel Interface Module

3.3.9.1. **Fuel Entry.** Input miles/hours, gallons, date, state, days utilized, and cost of fuel if outside vendor. Automatically updates odometer readings and PM schedules. Yes

3.3.9.2. **Electronic Fuel Interface.** Software shall accept data from an Electronic Fueling system and use this data to update associated files. Any fueling system is acceptable as long as data is compatible with Fuel Master fuel systems batch file.

Yes with Manual Fuel Import option. collectiveShop is also built with the future in mind. Our flexible import options allow you to import data from any system or Collective Data can provide these services for you.

3.3.10. Parts Inventory Module

3.3.10.1. Fully integrates with work orders. Yes

3.3.10.2. At least a 15 character alpha-numeric part number. – Yes

3.3.10.3. Minimum of 5 vendors for each part with corresponding cross-reference numbers, manufacturer, and last price paid. – Yes

3.3.10.4. At least a 6 character alpha-numeric bin location. – Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

- 3.3.10.5. Average price costing method with the ability to use LIFO or FIFO. collectiveShop utilizes a FIFO method for parts inventory.
- 3.3.10.6. Ability to mark up average price by user-defined percentage for an individual part. Yes With system Configuration
- 3.3.10.7. Ability to lock in part price charged to a vehicle regardless of the average price. - Yes
- 3.3.10.8. Ability to mark up non-inventory parts by a user-defined percentage. - Yes
- 3.3.10.9. Ability to flag a part as either a stocking or non-stocking part. – Yes
- 3.3.10.10. Ability to assign up to eight, four-character fits codes for each part. This allows the user to print a list of parts that fit on a vehicle type. – Yes
- 3.3.10.11. Up to 5 stocking locations per facility for 1 facility. Yes
- 3.3.10.12. Tracks accumulated parts usage per period and year to date. - Yes
- 3.3.10.13. The option of user-defined reorder points and quantities or system-adjusted reorder points and quantities on a part-by-part basis. - Yes
- 3.3.10.14. System displays the current on-order quantity - Yes
- 3.3.10.15. Back order quantity. - Yes
- 3.3.10.16. Last invoice number and date. - Yes
- 3.3.10.17. Part types: part, oil, tire, fuel, antifreeze, ntfr -Yes
- 3.3.10.18. Tracks part warranties by miles/hours and/or months. - Yes
- 3.3.10.19. Tracks component failure statistics by miles/hours and/or months. Yes
- 3.3.10.20. Part renumber utility. – Yes with our Table Editor
- 3.3.10.21. Part kits: up to 20 parts with associated quantities. Yes with Part Kit Module
- 3.3.10.22. Ability to take inventory using barcoding and a handheld data collection device. Data collected can be downloaded into parts inventory, compared to quantities-on-hand and adjusted simultaneously. – Yes
- 3.3.10.23. Ability to adjust parts inventory or back out a transaction. Yes
- 3.3.10.24. Ability to print regular or barcode tags for parts or bins. – Yes
- 3.3.10.25. Ability to read vendor barcodes. Yes standard UPC codes

3.3.11. Part Inventory Lists

- 3.3.11.1. By Part Number. - Yes
- 3.3.11.2. By Cross Reference Part Number. Yes
- 3.3.11.3. By Vendor - Yes
- 3.3.11.4. Non-Stock Parts.- Yes
- 3.3.11.5. By Bin Location. - Yes
- 3.3.11.6. By Part Name. - Yes
- 3.3.11.7. Part-Kit List. – Yes when used with parts kits module
- 3.3.11.8. Distribution List: For inventory purposes; Prints by bin location, all parts or just stocking parts, print with quantity-on-hand or with blank quantities, with or without barcodes. – yes

3.3.12. Parts Management Reports

- 3.3.12.1. Low use report prints parts on file with 1-13 consecutive periods of zero use. Yes
- 3.3.12.2. General use report by vendor or part number. Report lists quantities used per part per period. - Yes
- 3.3.12.3. Inventory Balance Report. - Yes
- 3.3.12.4. Parts adjustment report. Yes
- 3.3.12.5. Parts usage by work order. This report lists for a single part or all parts, the repair order, vehicle, part number, repair code, transaction date, quantity, price and total charged to a work order. - Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

3.3.12.6. Part failure analysis. Prints where in the life cycle each track able/warranty part fails by miles and/or months, for the period, year, and life-to-date. - Yes

3.3.12.7. Warranty reporting by part or vehicle number. – Yes

3.3.13. Vendor Information

3.3.13.1. Vendor Number (minimum 6 numeric digits). Yes

3.3.13.2. Vendor Abbreviation (minimum 6 alpha). Yes

3.3.13.3. Name, Address, City, State, Zip. Yes

3.3.13.4. Vendor Phone Number, Contact. Yes

3.3.13.5. Last Purchase Date. Yes

3.3.13.6. Year-to-date purchases. – Yes

3.3.14. Work Orders

3.3.14.1. The software must use VMRS format to specify labor codes. The software has the capability of defining difficulty factors that allow the user to designate up to 5 different time estimates for a single labor code depending on how difficult a task is on a specific vehicle or vehicle class. – Yes with VMRS codes

3.3.14.2. Capability of processing work orders in both real time or batch mode. – collectiveShop solution is a real time solution. It does not have a batch option in the base system. We do offer a sync & store solution at an optional \$2500 per seat.

3.3.14.3. Use of VMRS Repair Codes, 3 digit, 6 digit, or 9 digit level. Yes

3.3.14.4. Easy access to vehicle master file from work order processing. - Yes

3.3.14.5. Job related repair history displays when building or processing a work order. - Yes

3.3.14.6. Access to all repair history on file when building or processing a work order. - Yes

3.3.14.7. PM's due will display when building a work order. - Yes

3.3.14.8. VMRS, vehicle, customer, vendor, mechanics, parts look-up help screens throughout. - Yes

3.3.14.9. Tracks outside repairs including vendor, purchase order number, outside parts, and outside labor. - Yes

3.3.14.10. Ability to create template work orders to use over and over again with an unlimited checklist. Yes- Cloning function

3.3.14.11. Optional repair order priority codes – minimum 9 user defined. - Yes

3.3.14.12. Optional work order reason codes – minimum 99 user defined. – Yes

3.3.14.13. Optional work accomplished codes – minimum 20 user defined. - Yes

3.3.14.14. Optional work order line cause codes – minimum 15 user defined. - Yes

3.3.14.15. Work description codes – minimum 10 user defined. - Yes

3.3.14.16. Ability to edit codes once entered. - Yes

3.3.14.17. Ability to change work order post date. - Yes

3.3.14.18. Up to 99 repair lines per work order. – Yes, unlimited

3.3.14.19. Up to 5 lines (300 characters) notes per each work order line. Yes

3.3.14.20. Up to 3 lines (180 characters) master notes when closing work order. – Yes

3.3.14.21. Ability to add part record on-the-fly. Yes

3.3.14.22. Fully integrated parts module, automatic depletion of inventory when part is posted. Yes

3.3.14.23. Parts and labor warranty credits can be entered. – Yes

3.3.14.24. User has the option of accepting the current odometer reading of a vehicle when creating a work order or requiring entry of an odometer reading. Yes

3.3.14.25. User has option of system sequentially numbering work orders or assigning their own. – Yes

3.3.14.26. User has the option to allow the override of the mechanic's labor rate, part cost or tire cost during work order post routine. - Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

3.3.14.27. Work order post routine updates vehicle history, cost reports, mechanic productivity, and repair order transaction files. – Yes

3.3.14.28. Open work order line report is available by work order priority code or create date. This report prints each open work order line, when it was last updated, the posted parts amount, labor amount and labor hours. - Yes

3.3.14.29. A work order scheduling report is available by shop code, open work orders (yes or no). This report sorts by priority code, and prints the work order number, vehicle, customer, create date, number of jobs scheduled, number of jobs complete, and scheduled hours. Yes

3.3.14.30. The system can print, sort, and total work order by number, date, or customer, and select open, closed, or both. - Yes

3.3.15. Paperless Shop Module (Optional)

3.3.15.1. Uses computer workstations in a real-time mode on the shop floor. Yes collectiveShop's technician view is designed for quick data entry and to be used ideally with a touch screen monitor.

3.3.15.2. Mechanics clock on and off assigned jobs and indirect jobs such as fueling vehicles, or cleaning shop floor, at the mechanic workstation. - Yes

3.3.15.3. An unlimited number of jobs can be assigned to each mechanic. – Yes and you can monitor current job progress on the shop floor.

3.3.15.4. The system calculates the actual time spent on a job, tracking the mechanic's entire work day. Yes

3.3.15.5. The mechanic can clock off a job prior to its completion, start another job, then clock back on a previous job. The system will accumulate the total time spent. Yes they can also clock into indirect labor tasks such as shop maintenance as defined by the administrator

3.3.15.6. Mechanics and/or parts personnel can be given the rights to post parts used on a job, including tires. – Yes

3.3.15.7. Mechanics and/or parts personnel can use a barcode reader to post parts on a work order in paperless shop. Yes

3.3.15.8. Management personnel can add, delete, and reprioritize jobs assigned to a mechanic throughout the workday -- Yes

3.3.15.9. The system is tracking the actual time spent on the job versus the estimated time. The program is keeping all records up-to-date and accurate in a real-time mode. Yes with the predefined parts and labor module.

3.3.16. Tire Module – Software shall supply a tire record file for each tire owned or leased by the user, indicating:

3.3.16.1. Tire number. - Yes

3.3.16.2. Vehicle mounted on. - Yes

3.3.16.3. Tire position - Yes

3.3.16.4. Number of caps. -Yes

3.3.16.5. Capper number. -Yes

3.3.16.6. Tire size. -Yes

3.3.16.7. Tire type. -Yes

3.3.16.8. Total cost. -Yes

3.3.16.9. Mounted odometer. Yes

3.3.16.10. Tread type. Yes

3.3.16.11. Ply rating. Yes

3.3.16.12. Current vehicle odometer. Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

3.3.17. Tire Reporting (Optional)

3.3.17.1. Software provides a report to project the number of tires due to fail over a specified number of periods based on the tire's mileage and wear characteristics. - Yes

3.3.17.2. Software provides manufacturer and cappers cost and performance reports. - Yes

3.3.17.3. Software provides tire life transaction reports by all transactions or a particular type of transaction such as send capper. -Yes

3.3.17.4. Software provides inventory lists by tire or vehicle. – Yes

3.3.18. Image Viewer (Optional) – The software may have the ability to attach and view from within the software any text or image file. The image viewer can be used to attach files to the following areas of the software:

Parts: MSDS sheets, schematics, warranties **Vehicles:** Photo, accident damage picture, accident report, original specs **Vendors:** Warranties, return policies, location, product lines, pricing structure **Facilities:** Photo, map/directions, shop and building layout **Customers:** Contracts, payment history, capitalization approvals **Departments:** Building layouts and schematics, correspondence, contracts **Purchase Orders:** Signed receipts, invoices, credit slips **Work Orders:** Damage photos and reports, modification approvals, old part pictures **Estimate Work Orders:** Photos, signed agreement, additional notes **Tools:** Photo, schematics, warranty **Tires:** Warranty, photo **Employees:** Application, certificates, drivers license, insurance **Mounted Equipment:** Photo installed, schematics, warranty **Fuel Pumps & Tanks:** UST information, pressure tests, certifications, schematics **Motor Pool Reservations:** Accident damages, photos, signed contracts, drivers license, insurance.

collectiveShop with the EAM module allows for the attaching of unlimited documents to various places throughout the software including the areas identified above.

3.3.19. Bar Coding

3.3.19.1. The software must accept bar coded entry for unit related entries, parts, inventory, PO parts received, and allow for bin location. - Yes

3.3.19.2. Software supports label printing when receiving parts. - Yes

3.3.19.3. Parts can be scanned to WO - Yes

3.3.19.4. When receiving a part, the system auto-creates an audit trail to support accurate inventory analysis and work order posting. - Yes

3.3.19.5. Bar codes can be uniquely created for equipment and personnel identification. – Yes

3.3.20. Dashboard -Run separately from main system, software supports user dashboards that highlight realtime data for preventive maintenance stats, work order line entries, purchase orders, vehicle status, labor hour and other monitoring widgets.

Yes with our Mission Control Module, each person with access to Mission Control can monitor and track their own unique KPI's. Mission Control is the next generation of Dashboard tools allowing you to see items you desire and have the ability to drill down to the root cause affecting the KPI.

3.3.21. Report Writing

3.3.21.1. Data can be sorted in any order based on any field or any combination of up to nine different fields. - Yes

3.3.21.2. Software supports and uses alternate index keys so many report orders can be used without sorting. – Yes with filtering functionality

3.3.21.3. Based on index keys, file reads can be started and stopped at specific locations so that data from large files can be extracted very quickly. – Yes

Exhibit A
Collective Data response to RFP #33-03Sep13

Formatting

- 3.3.21.4. User can control every position on every line, so that reports can be tailored to the exact format requirement. – Yes with Reporting editor, any data captured in the system can be reported on in any format.
- 3.3.21.5. Reporting on subtotals and/or totals without detail is possible. – Yes
- 3.3.21.6. Subtotal and/or total information can be directed to one output device or method while detail is sent to another. – Yes
- 3.3.21.7. Nested subtotals are supported to nine levels all automatically. – Yes
- 3.3.21.8. Multiple records per line or multiple lines per record are supported. - Yes
- 3.3.21.9. Page lengths, headings, footers are supported. – Yes
- 3.3.21.10. Field editing can be defaulted or custom designed with edit masks (templates). Yes with Object Revolution
- 3.3.21.11. System constants (date, time, page and records counters, etc.) are available for inclusion in reports. – Yes

Output

- 3.3.21.12. Output can be directed to printers or screens in the same report. - Yes
- 3.3.21.13. Output can be directed to character separated files for exporting to other packages. – Yes in CSV
- 3.3.21.14. Data can be sent to an interim file for later, subsequent reporting. – Yes
- 3.3.21.15. Output modes can be changed on the fly so development work can be done at a terminal and final output can be directed to any printer. - Yes
- 3.3.21.16. All screen output is captured so final reports can be scrolled backwards, forwards and side to side without limits. - Yes
- 3.3.21.17. Saved reports can be run in the background on multi-user computers or run sequentially unattended in a single-user environment. – Yes with Exception Reporting module

Training

At a minimum, the vendor must supply user documentation, on-site training and/or web-based training, and technical support as required by the County. The vendor must also supply on-line and toll free telephone help for its proposed solution.

Each bidder must provide the names of the employees who will be directly involved in this project and their experience in providing and installing fleet management system software.

Provide a detailed description of the training proposed. Indicate if training can be accomplished on site or if personnel will need to travel to a training site. The following additional information is to be provided in regards to training:

Exhibit A
Collective Data response to RFP #33-03Sep13

Project Management Team:

Sean Taylor- Sr Sales Consultant- 5+ years experience
Jon Sullivan- Project Manager/Development Manager- 5+ years experience
Abbey Briney- Account Manager- 5+ years experience
Thad Trier- Sr. Trainer- 5+ years experience
Randy Ridenour- Sr. Trainer- 3+ years experience
Mark Zollo- Distribution/ Tech Support 15+ years
Steve Neal- Development 2 years
Tim Banko- Development 2 years

3.4.1. References for Training

City of O'Fallon - John Griesenauer- 636-379-5501 or jgriesenauer@ofallon.mo.us

CCC – Paul Peterson- 210-662-4573 or paulp@cccgroupinc.com

Placer County Sheriff – Matt Burgans- 530-889-7865 or mburgans@placer.ca.gov

3.4.2. Training Agendas, Descriptions, etc.

See Exhibit E

3.4.3. Samples of Training Materials

See Exhibit F

3.4.4. Statement Concerning Minimum/Maximum Class Size

Collective Data's training programs are tailored to fit your implementation. We will as part of the kick off meeting be discussing the various roles, types of training (user, train the trainer, combo) that best meets the needs of you and your staff. Generally Collective Data likes to restrict the size of an individual class to no more than 15 individuals in one session. Training throughout the day may have more than one session specializing in an area or role.

3.4.5. Equipment Provided/Needed for Training

Ideally we would have training in a classroom setting with the computers loaded with our collectiveShop client. This will give your trainees the ability to have hands on experience with the software during training.

3.4.6. Number of Days/Hours of Training

Collective Data will be recommending 4 days of Training for this engagement, 3 days geared towards the users and super users and 1 day geared towards your IT personnel.



QUOTE

Boone County Public Works
 Greg Edington
 5551 Hwy 63 South
 Columbia, MO 65201

Quote #: 3258.RFP-
 Date: 09/06/2013
 Expiration Date: 12/06/2013

Qty	Item	Price	Extended Price
1	collectiveShop 5.5 Includes : * 10 - Concurrent Users * 1- Year Support & Updates * PostgreSQL Database * Web Portal Access * Full Editor Set Additional Concurrent License Packs are available: Single Users: \$1,000 each 5-Packs of Users: \$3,500 each	\$18,495.00	\$18,495.00
1	Customer Relationship Module The Customer Relationship Module (CRM) allows you to track and manage all of the data for individual clients that you serve.	\$2,995.00	\$2,995.00
1	Pre-Defined Parts and Labor Module * Set up parts and labor for a work code in advance * Parts and Labor automatically added to the work order when that work code is used.	\$1,500.00	\$1,500.00
1	Extended Asset Management Module * Gives you the ability to track countless unique asset types. * Schedule and perform labor on the asset types defined by you. * Allows you to define the label names of the fields you wish to track for each asset, and define when the fields are shown for each asset type's record. * Additionally, 4 meters are available to each asset.	\$4,995.00	\$4,995.00
2	Additional Meter * Adds an extra meter to the system. The new meter(s) will be available on all views that have Meter 1 and Meter 2 in addition to various reports.	\$1,500.00	\$3,000.00
1	Modification of base software or module IFTAModule Modification of base software or module per client request	\$1,500.00	\$1,500.00
1	Part Kit Module * Allows you the ability to set up predefined 'kits' of parts. Once these are set up, they can be added to a Work Order with an easy click of a button.	\$1,500.00	\$1,500.00
1	Module 5.5 Active Directory	\$3,500.00	\$3,500.00



QUOTE

Quote #: 3258.RFP-
Date: 09/06/2013

Supports existing user management by allowing users to log into Collective Data software through Windows Active Directory authentication. Benefit from having one source for passwords, user deletion, etc. that are all updated and synced with Collective Data software automatically.

1	VMRS Codes Configure and preload VMRS codes for Part Failure, Repair, Repair Reason, and VMRS Work Accomplished	\$950.00	\$950.00
1	Auto Email Task Notification Auto e-mail of Task List Items: Enhance the functionality of your software to include the ability to auto e-mail drivers/managers to notify them of upcoming scheduled items from your task list. E-mails are sent out on a user defined time frame. In the event a task is not performed by a specified time the system will generate a 2nd e-mail to indicate the task hasn't been performed, and is overdue.	<i>Optional: \$2,500.00</i>	
Circle choice for optional product: Accept / Decline			
1	Manual Fuel Import - Fuel Master The manual Fuel Master fuel import is a valuable add-on that allows you to import your Fuel Master transaction data into your Collective Data software. This ensures fuel log records are accurate and eliminates extra data entry.	\$1,500.00	\$1,500.00
1	Motor Pool * Allows for reservations, tracking, and allocation of vehicles within your fleet's Motor Pool. * Includes pre and post-trip inspections.	\$1,500.00	\$1,500.00
1	Audit Logging Audit Logging tracks data changes made by users. This includes inserts, updates, and deletes. This module adds an extra element of accountability and can be the key to helping you find out: "Who made that change?".	\$1,500.00	\$1,500.00
1	Module Mission Control Module The Mission Control Module is a powerful dashboard-style view that allows a user to manage various aspects of the fleet operation in one place. Users will see a summary of important key performance indicators that they can take action on with ease.	\$3,500.00	\$3,500.00
1	Exception Reports * Automate report generation in a timely basis. * Conditionally email reports via PDF or CSV to one or more recipients. * Specify the conditions under which the report should be generated, and to whom it should be sent.	\$2,995.00	\$2,995.00
1	Installation and configuration Service Configuration Services	\$3,000.00	\$3,000.00



QUOTE

Quote #: 3258.RFP-
Date: 09/06/2013

Remote configuration of Security Profiles settings templates as based on client requirements. Assistance and consulting on workflow set up based on client process. Addition of up to 5 additional fields to accomidate needs of the county.

1	Data Import Script Extraction and Import of existing JetFleet Data	\$10,000.00	\$10,000.00
1	Training - On Site Training at Customer Premises	\$3,000.00	
3	(Additional) Training - On Site Training at Customer Premises - Consecutive Days of On-Site End User Training. Includes all travel expenses. - Training to be scheduled after final delivery of user system with a 2 week minimum lead time. - Final payment must be received prior to scheduling on site training. - Must use training services with 12 months. - Includes a two (2) hour web training session for each consecutive on-site training day, to be used within six months of the on-site training.	\$1,500.00	\$7,500.00

Final day of training will be geared toward IT Staff for the county where they will learn to manage an use the:

- * Report Editors
- * Security Editors
- * Import Editors
- * Desktop Editors
- * General System Administration

Grand Total **\$69,930.00**

NOTE: Optional Products are not included in Quote Total

Quotation prepared by:
Sean Taylor
staylor@collectivedata.com
319-362-1993 x2115
FAX: 319-364-4306

To accept this quotation, please sign and fax to 319-364-4306

Print Name: _____

Signature: _____



QUOTE

Quote #: 3258.RFP-
Date: 09/06/2013

Thank you for your business!

- * All projects are prioritized based on the date that payment is received.
- * By signing this document, the signer is committing to purchase the products and services listed in this quote and agreeing to the payment terms listed in this quote. The signer also acknowledges the authority to sign this document on behalf of the organization listed.
- * Collective Data offers software Lease Financing Options through Marlin Leasing. Ask your sales representative about how to purchase your software now and pay for it over time. Leasing options available up to 36 months.
- * All training requires advanced payment prior to scheduling the date. Price quoted reflects training fees only. Onsite training must be scheduled a minimum of 2 weeks in advance. Additional fees may apply to travel outside of the continental United States and
- * A signed and dated support and maintenance agreement is required at the time of final delivery. Technical support is available to clients with an in-force, signed maintenance agreement on file. The first year of support is included in the original purchase price and support renewals are quoted one year after initial installation. Maintenance renewals are based on two options:
 - Standard Support = 15% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, and complete access to client care webinars and our online knowledge database. Support renewal is calculated at 15% of List Price plus any new customizations/ongoing imports/etc. that may be added after initial sale. Excludes training, hardware or one time imports.
 - Premium Support = 25% of the software costs. This includes live support 8:00am to 5:00pm CST, all maintenance and system updates, two hours of web conference training, complete access to client care webinars and our online knowledge database, and Supported Version Guarantee. This means you will always be on a supported version (EX: we are on version 5.5, if we jump to 6.0 and decide to no longer support 5.5, then with this support agreement option you would get upgraded free of charge and your new support cost would be based on the software price at that time, doesn't include any new add-ons that you might request, one base system). Support renewal is calculated at 25% of List Price plus any new customizations/ongoing imports/etc. that may be added after initial sale. Excludes training, hardware or one time imports.
- * Optional items are not included in the total.
- * The quote expires on the date of expiration listed at the top of this quote.
- * Standard Payment Terms: 75% of total price of software and services listed on the purchase agreement are invoiced upon receipt of signed agreement, remaining 25% of listed amount will be invoiced upon delivery. All projects are prioritized based on payment received date.
- * Collective Data software natively supports the following database servers: PostgreSQL, MS SQL 2005, and 2008. No additional licensing is required to operate with PostgreSQL. Licensing for MS SQL is not included and is the responsibility of the Customer.

230 2nd ST SE, STE 414 * Cedar Rapids, IA52401 * PH: 319-362-1993 * FAX: 319-364-4306

System Requirements

Minimum System Requirements for the Client (or Server **without PostgreSQL**):

- 1.0 GHz or faster Intel or AMD processor
- 1.0 GB RAM dedicated to the client or server (2.5 GB dedicated to the client or server for report generation)
- Hard disk with at least 512 MB free space
- Microsoft Windows: 7, 8, Vista, XP Pro, 2003 Server (w/SP1 and .NET v3.5), 2008 Server, 2008 R2 Server, 2012 Server with GUI, and 2012 Data Center with GUI
- MS SQL 2005, 2008, and 2012 are supported as a backend database
- Virtualization is supported as long as the required hardware is assigned to the virtual machine and it is running a supported OS
- 10Mbps or faster Ethernet card (with connectivity to the database and collectiveFleet Server, or to client machines in the case of the server)

Recommended System Requirements for the Client (or Server **without PostgreSQL**):

- 2.0 GHz or faster Intel or AMD processor
- 1.5 GB RAM dedicated to the client or server (3.0 GB dedicated to the client or server for report generation)
- Hard disk with at least 512 MB free space
- Microsoft Windows: 7, 8, Vista, XP Pro, 2003 Server (w/SP1 and .NET v3.5), 2008 Server, 2008 R2 Server, 2012 Server with GUI, and 2012 Data Center with GUI
- MS SQL 2005, 2008, and 2012 are supported as a backend database
- Virtualization is supported as long as the required hardware is assigned to the virtual machine and it is running a supported OS
- 10Mbps or faster Ethernet card (with connectivity to the database and collectiveFleet Server, or to client machines in the case of the server)
- Internet connection to the Server (for automatic updates only)

Minimum System Requirements for the Server **with PostgreSQL**:

- 2.0 GHz or faster Intel or AMD processor
- 2.0 GB RAM dedicated to the client or server (2.5 GB dedicated to the client or server for report generation)
- Hard disk with at least 1.0 GB free space
- Microsoft Windows: 7, 8, Vista, XP Pro, 2003 Server (w/SP1 and .NET v3.5), 2008 Server, 2008 R2 Server, 2012 Server with GUI, and 2012 Data Center with GUI
- Virtualization is supported as long as the required hardware is assigned to the virtual machine and it is running a supported OS
- 10Mbps or faster Ethernet card (with connectivity to the database and Server, or to client machines in the case of the server)

Recommended System Requirements for the Server **with PostgreSQL**:

- 3.0 GHz or faster Intel or AMD processor
- 2.5 GB RAM dedicated to the client or server (3.0 GB dedicated to the client or server for report generation)
- Hard disk with at least 1.0 GB free space
- Microsoft Windows: 7, 8, Vista, XP Pro, 2003 Server (w/SP1 and .NET v3.5), 2008 Server, 2008 R2 Server, 2012 Server with GUI, and 2012 Data Center with GUI
- Virtualization is supported as long as the required hardware is assigned to the virtual machine and it is running a supported OS
- 10Mbps or faster Ethernet card (with connectivity to the database and Server, or to client machines in the case of the server)

collectiveData

Innovative technology driving fleets forward.

Software Support

Collective Data strives to provide the best customer support possible. We're dedicated to fixing any issues that may arise in the implementation of an enterprise software solution. And it shows. We received a **97% positive support rating** on our customer satisfaction survey last year.

What's included in support?

- All product maintenance updates and upgrades
- Telephone support, 8-5 PM CST Monday-Friday
- E-mail support: support@collectivedata.com
- 24-hour online Knowledge Base and webinar videos:
<http://support.collectivedata.com>
- Assistance through remote diagnosis tools:
(GoToMeeting, RDP, Citrix Client)
- Hardware support for devices purchased through Collective Data and is within the warranty period
- Provide support related documentation on request
- 2, 4, or 6 hours of free web-based training depending on the software you purchase.

What is covered by support?

Technical issues regarding the functionality of the software such as:

- Functions not performing to specifications
- Data corruption issues
- Error messaging in the software
- Missing data
- Issues related to any modification or customizations purchased
- Front-line support for integration issues with 3rd party applications.



More about Support:

** Your first year of support is **included** with the purchase of your Collective Data software solution. A fee will be accessed for support renewal for ongoing years (*Contact us for details*).

We also offer flexible options for your organization as your needs change over time! Contact us anytime for questions about *purchasing*:

- Configurations & modifications to your software such as additional fields, label changes, etc.
- Custom functionality needs.
- Custom reports.
- Excellent training options.

Exhibit E

Training Schedule Sample

Tuesday –

8:00-9:00 – Introduction, goals, objectives

9:00-11:00 – Walkthrough of the software

- a. Cover the navigation of the software
- b. Go over the major views of the software
- c. Entering new vehicles
- d. Entering new parts
- e. Vehicle, employee scheduling
- f. Work orders, po's, invoice, receiving parts.

11:00-12:00 – Go through reporting

- a. Custom reports
- b. Exporting reports
- c. Adhoc Reporting

12:00-1:00 – Lunch

2:00-4:00 – Importing and exporting

Wednesday –

8:00-9:00 - Review and questions from the previous day

9:00-11:00 – Security Setting's

- a. Setting up groups
- b. Limiting views, abilities through security settings
- c. Defining abilities within the software
 - a. Removing tabs, views fields
- d. Limiting based on location/department
 - a. Show how to limit personal based on user log in information
 - b. Show only equipment, warehouses, work orders that pertain to their group.

11:00-12:00 – Implement groups and users

12:00-1:00 Lunch

1:00-3:00 - Object revolution

1. Changing fields to fit your needs
2. Adding Fields
3. Implementation

3:00-4:00 – Questions and Review

Exhibit E

Sample Training Schedule-2

Tuesday – 13th

8:00am – 8:15

Introduction, Goals, Objectives

8:15 – 11:30 am

- A. General Navigation
- B. Location and Departments
- C. Employee Set Up
- D. Equipment/Asset View
- E. Asset Types Creation

11:30 – 12:30 Lunch

12:30 - 4:00pm – Continue with Asset Type Creation

- F. Equipment Meters Extended
- G. Asset Lifecycle
- H. PM Scheduling
- I. Basic Parts Inventory Knowledge
- J. Parts Inventory Ordering
- K. Parts Inventory Additional Items

4:00 – 4:30pm – Remaining time for questions and Discussion.

Wednesday – 14th

8:00 – 8:30am – Review and Discussion

8:30 – 11:30am –

- A. Work Orders and Maintenance
- B. Shop Functions
- C. Technician Functions
- D. Basic Report Running
- E. Tool Assignments

11:30 – 12:30 – Lunch

12:30 – 4:30pm –

- F. Billing Features
- G. Risk Management
- H. Jobsite Module
- I. NAPA Integration
- J. Zonar Integration
- K. Fuel Log View/ Imports
- L. Motor Pool
- M. Web Portal
- N. Auto PM Emails

Thursday 15th –

8:00 – 8:30am – Q and A

8:30 – 11:30

- A. Query Editor
- B. Object Revolution Editor
- C. Import Editor

11:30 – 12:30 - Lunch

12:30 – 4:30

- D. Report Editor
- E. Exception Report Editor
- F. Security User/Group Editors



collectiveFleet

Fleet Management Software

End User Training Guide

Date Last Modified: 2/2/2012

Version: 5.5

Information in this document is subject to change without notice, and does not represent a commitment on the part of Collective Data, Inc. No part of this manual may be reproduced or transmitted in any form, or by any means whatsoever, without the written permission of Collective Data, Inc.

© 2012 Collective Data, Inc.

collectiveFleet are trademarks of Collective Data, Inc.

Windows is a trademark of Microsoft Corporation.

MySQL is a trademark of MySQL AB

Any other brand or product name mentioned in this publication is a trademark or registered trademark of its respective holder.

TABLE OF CONTENTS

1	INTRODUCTION	4
1.1	Purpose of This Guide.....	4
1.2	Collective Data.....	4
1.3	Goals.....	4
2	GENERAL NAVIGATION	5
2.1	Introduction	5
2.2	System Overview	5
2.3	Menu.....	7
2.4	Desktop.....	7
2.5	Desktop Toolbar.....	8
2.6	Special Controls	9
3	LOCATIONS AND DEPARTMENTS.....	12
3.1	Location Main Tab.....	12
3.2	Departments Tab	14
4	EMPLOYEES.....	16
5	EQUIPMENT	18
5.1	Equipment Quick Meter Update	21
5.2	Equipment Meter Readings.....	22
5.3	Meter Replacement	23
6	PARTS INVENTORY	25
6.1	Adding a New Part	25
6.2	Purchase Orders.....	26
6.3	Receive Parts in One Step	28
6.4	Inventory Adjustments	29
7	FUEL LOG	31
8	MAINTENANCE REQUEST SYSTEM.....	33
9	TO DO LIST AND OTHER TASK LISTS.....	35
10	WORK ORDERS.....	36
10.1	Create a Work Order Manually	36
10.2	Poll History.....	38
10.3	Poll Scheduled Items Within – OPT Button.....	40
11	CREATING AND MANAGING RECALLS.....	43
11.1	Open the Recall	43
11.2	Recall Work Orders	45
11.3	Completing the Recall	46
12	ACCIDENTS/CLAIMS.....	47
13	TRAFFIC VIOLATIONS.....	50
14	REPORTS.....	51

1 INTRODUCTION

1.1 Purpose of This Guide

This document is to be used for on-site training of the employees within your company who will be end users of the Collective Data Fleet Management software application. For all application functionality refer to the Collective Data Fleet User Guide which is found under the menu Help option and from the Getting Started Desktop icon.

1.2 Collective Data

Collective Data is a software development company, founded in 1997, that provides configurable fleet and asset management solutions for the Utility, Government, Emergency Services, Construction, and Transportation industries. Our proven solutions are tailored to meet specific industry needs and go far beyond traditional, off-the-shelf fleet maintenance software programs. We help organizations to manage more of their operation with one software system.

By working with organizations just like yours, we are able to offer software solutions that help you manage your vehicles, equipment, parts, employees, and other assets at a whole new level.

1.3 Goals

The goal of this training is for your team to understand and be confident in their ability to utilize the software to manage your assets. We will accomplish this by working through this manual and addressing any additional items that may arise. To that end, we ask that every one participating in this training understand the following:

1. Questions: Ask questions as they arise. We may defer them to a later time, but make sure to ask them so we can answer them.
2. Configurations: Collective Data is known for our ability to tailor fit our software to meet our customer's needs. If you ask if we can change something about the software, the answer is most likely that we can. Please keep in mind, there is a cost for customizations and they will need to be quoted after the training is completed.
3. Training success: Collective Data is dedicated to ensuring you are fully trained to use the software to complete your processes. If you feel the training is moving too quickly, not quickly enough, or needs to touch on additional topics, please let us know as we progress through this session.

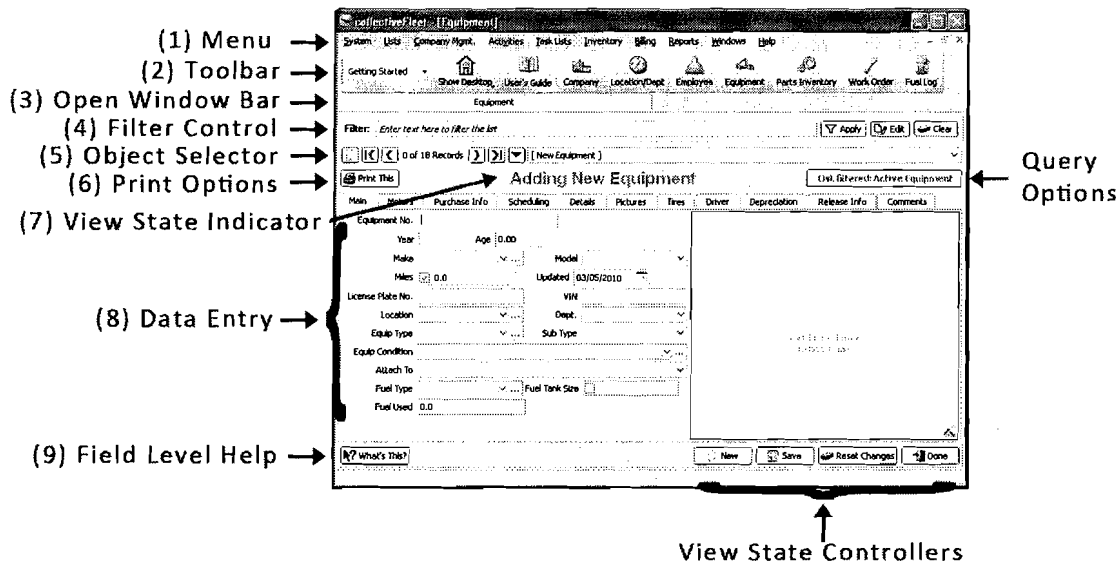
2 GENERAL NAVIGATION

2.1 Introduction

This section covers the fundamentals of using collectiveFleet in the Windows environment and general navigation that can be accomplished using several methods within the application.

2.2 System Overview

In this section we will cover some of the main components of the user interface of the collectiveFleet system. The image below is using the equipment screen for the purpose of demonstration only - please understand that the rest of the views you will typically reference within the software will follow a very similar look and feel.



Menu:

The Menu is located at the top of the Screen. The menu allows you to open Views and Reports and perform different Actions within the software. If you have used other windows programs, you should find the Menu familiar.

Tool Bar:

The Tool Bar is located right below the Menu by default. The Tool Bar can be moved to either side or the bottom of the application or can be floating within the Desktop

Open Window Bar:

The Open Windows Tab Bar displays the open Views within the software. To switch from one View to another within the Window Tabs, simply select the tab's view that is desired.

Filter Control:

The Filter Control allows you to limit the Object List so you can find a specific object quickly. The Filter control is an adhoc (onetime) filtering of the Object List.

Print Options:

The Print This... button allows you to view or print a report for the selected Object. This option is only on selected Views. When you select the Print This...button, a list of applicable reports will appear for you to choose from (if more than one is available) to view.

View State Indicator:

The View State Indicator will quickly indicate the current state of the view. The two most common view states are Edit and New. This indicator will also describe the type of item that is being edited or created (i.e. Equipment, Work Order, etc.). On certain views or under special circumstances, you may also have a view that is in Browse mode. This could be because of limited security access for the user logged in or if more control on editing items is necessary on a certain view. It may be possible to double click on an item to edit it if editing the item is available to the currently user.

Query Options

The Query Options button, which is available on most views, allows you to select predefined Queries to Filter the Data Records list. When one or more queries are currently applied to the Object List, the text will be displayed in red. You can press this button at any time to switch the applied Queries. By selecting a different query from the list, the original queries will be unapplied. If you require multiple queries to be applied at one time, you can use the Query Selector option to apply any number of queries.

Object List:

The Object list section displays all or some of the objects available for browsing, editing or reporting on. An object can represent any logical group of information within the system. Each view will typically associate itself with one or more objects that can be managed by the view. For example, the Equipment View will have a list of your Equipment in the Object List. In certain views, there may be multiple types of objects displayed in an Object List, and depending on the type of object selected, you will have different options available regarding editing or printing of the information. The selected object in the list will be indicated by a colored shading of the row.

Data Entry:

The Data Entry section will contain a number of elements and controls available to modify and manage the selected object. In certain cases, when a large amount of information can be collected for the selected object, the Data Entry will be logically organized by using Tab Controls, and Detail Lists. The system works with a number of different data entry controls that represent different type of data (like numbers, dates, images, etc.) within an object.

Field Level Help:

The What's This button gives a quick display of information regarding a field or control within the Data Entry section. By pressing this button, the mouse cursor will switch to a question mark with an arrow. While the mouse cursor is in this state, click on an item in the Data Entry section for further explanation of the field. Different information may be available depending on the control type clicked on. For example, a number field may show the range of number accepted by the control, and a drop list field may show what fields are available for the Quick Find method in the drop list.

View State Controllers:

The View State Controllers, in most views, will consist of four buttons. Some Views may not have all four buttons:

- **New:** allows you to enter a New Data Record for the View you are on. You can also select and hold down the Ctrl key while pressing the N key to enter a New Record.
- **Save:** saves the detail data entry items for the selected Record you are on. You can also select and hold down the Ctrl key while pressing the S key to save a Record.
- **Reset Changes:** cancels any changes you have made since the last time the Data Records had been saved.
- **Done:** closes the View.

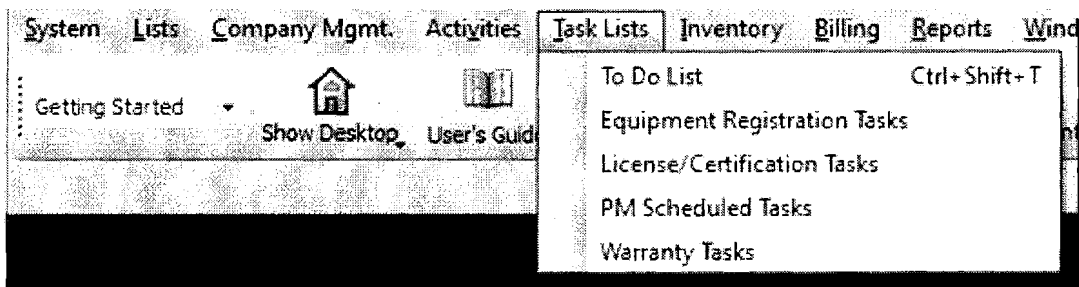
2.3 Menu

The menu is available to navigate actions, views and reports available within the system.



Click on the menu item you wish to see the associated drop list of items to choose from.

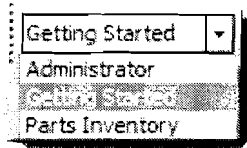
As shown, the Task Lists menu item has been selected. Select the task list item from the drop list to open the view you need.



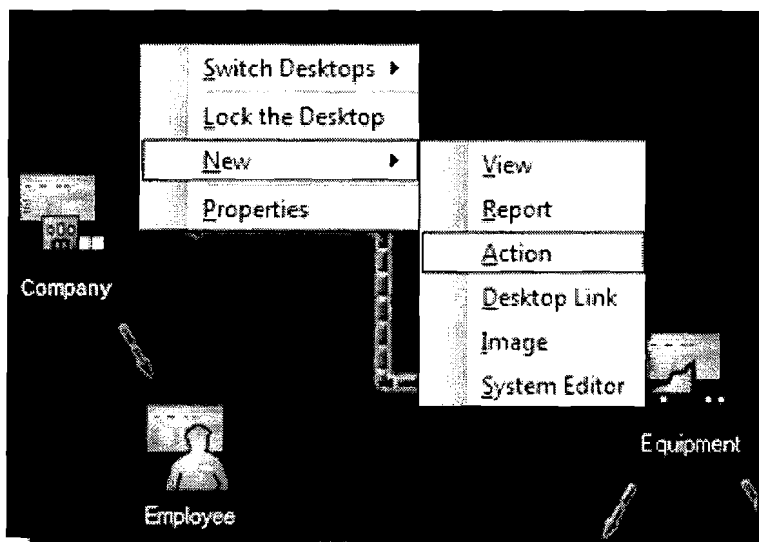
2.4 Desktop

The desktop was specifically designed to be each user's shortcut into the areas of the system that is most relevant to their daily activities.

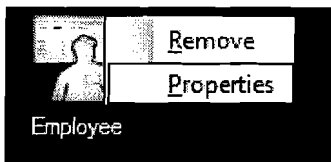
A few desktops are included with the default implementation, but any of these can be changed to meet your specific needs. You can also create any number of new desktops.



Right click on a clear area of the desktop to change the active desktop, create a new one, change properties of the current desktop, or to add new elements to the desktop.



Right click on an item on the desktop to change its properties.



2.5 Desktop Toolbar

The toolbar is a quick way to access the more common areas of the system. It is located directly under the Menu.



The toolbar icons will display the same icons the selected desktop contains for convenience when the desktop is obstructed with open views or reports. By changing the active desktop using the drop list (shown with Getting Started above), you will change the currently active desktop and the toolbar icons will change to match the desktop you have changed to.

A Show Desktop icon follows the desktop list which will hide all open views and reports, giving you quick access to the desktop.

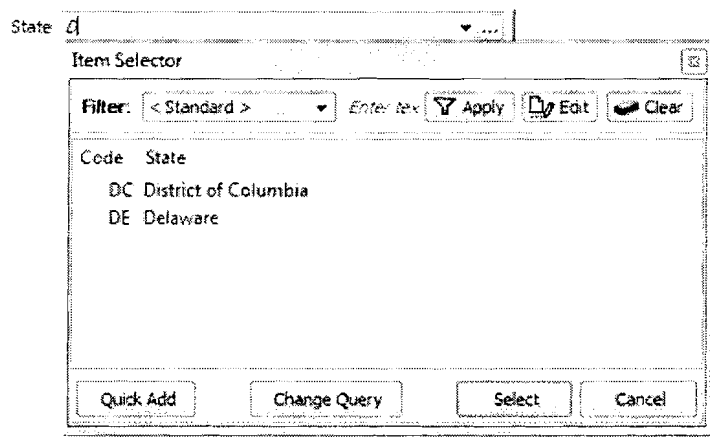
2.6 Special Controls


2.6.1 The drop list control

The drop list control allows the user a number of ways to select a value. In this example we are selecting a state.



- Step 1** Press the down arrow located on the right side of the control to get a drop down window. Locate the desired state from the list and either double click it or press the Select button at the bottom of the drop list window.
- Step 2** Highlight the text of the state you just selected and press the delete key to remove the state selection.
- Step 3** Type in the letter “D” into the control. This will show you the drop list again but with only the two states that begin with D. You can use your up and down arrow keys to choose which state you would like to select and then press the enter key.



- Step 4** If you need to modify a record, press the Ellipse button  on the right of the State Control to open up the State View. Here you can add, modify, or delete entries from the list to match your organizations needs.

2.6.2 Setting Dates

There are several ways dates can be entered:

- You can click on the calendar icon to use the popup calendar.
- You can type in a date in many formats (e.g. 1/1/2010)
- To set the date to the current date, hold in the Ctrl Key and press the letter T (for Today).
- Pressing the calendar icon with your mouse will open the calendar view allowing you to quickly select a particular date.
- You can also use the keyboard to open the date calendar window by pressing the down arrow key.
- You can use your arrow keys to change the selected day.
- You can use the Page Up and Page Down keys to quickly switch between months

2.6.3 The email and web address controls

These controls allow you to enter text similar to any other character type field. However, if the field contains either a valid email or web address, you can press the icon on the right of the control to automatically open your email program or web browser.

Email test@collectivedata.com



2.6.4 The image control

The image control allows you to store images in the system. To add an image, simply click the small photo icon located in the bottom/right corner of the control. You can select any digital image accessible from your computer.

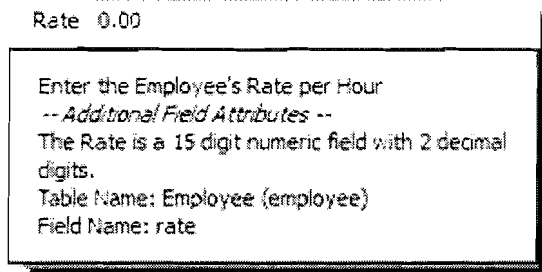


2.6.5 What's This Button:

The What's This Button is your on-line help. If you need to know what to enter, what type of characters, how many characters, if it is required, if it has to be unique, click on this button. It will turn into a question mark as shown.



Click on the field you need to know the information for. A user dialog box will appear containing the field level on line help information.

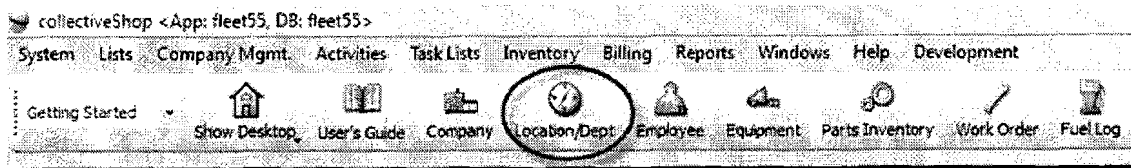


3 LOCATIONS AND DEPARTMENTS

Your fleet may be organized by locations and departments. This can help organize a large number of equipment by limiting what you see by logical groups. In addition, you can break up cost information for particular departments.

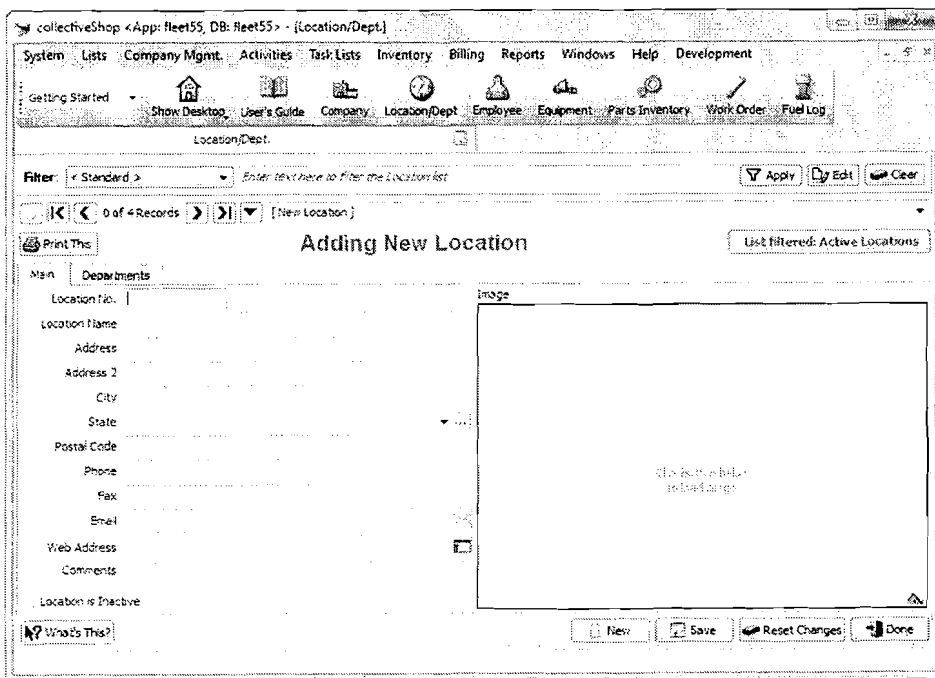
Your company may only have one location and department. If this is true you will not need to use the departmental level reports included in the application. Instead use the reports at the equipment, work order, employee, etc. level.

Press the Location/Dept icon located on the toolbar to open up the Location view.



3.1 Location Main Tab

The Location Main Tab is where you will set up the physical locations for your company.



- Step 1** The Location/Dept view is currently in new mode, ready for a new location and its respective departments. Enter a new location:
- ◆ Enter a location (number and/or name), this must be unique in the application, choose something that is applicable or unique to use in the Location field.
 - ◆ Enter the main address information into the Address field.
 - ◆ Enter the secondary address information into the Address 2 field.
 - ◆ Enter the city into the City field.
 - ◆ Select the State from the State field drop list.
 - ◆ Enter the postal code into the Postal Code Field.
 - ◆ Enter the fax number into the Fax field.
 - ◆ Enter the appropriate email address for the location into the E-mail field.
 - ◆ Enter the web address for the location if there is one.
 - ◆ Enter comments pertinent to the location into the Comments field.
 - ◆ Load a picture of the facility in the Image field.

Step 2 When you have entered the information for the location, press the Save button located at the bottom of the view.

Step 3 If you want to enter another location, press the New button at the bottom right of the view or the top left to put the view into New mode.

The screenshot shows a web application interface for editing a location. The title is "Editing Location". The form contains the following fields and values:

Field	Value
Location No.	100
Location Name	Cedar Rapids
Address	308 3rd St. SE
Address 2	Suite 200
City	Cedar Rapids
State	IA
Postal Code	52401
Phone	800-750-7533
Fax	319-366-4906
Email	sdrew@collectivedata.com
Web Address	www.collectivedata.com
Comments	Cedar Rapids location comments field, enter information here or

At the bottom left, there is a checkbox labeled "Location is Inactive". At the bottom right, there are buttons for "New", "Save", "Reset Changes", and "Done". The "New" button is circled in red. The top of the form shows a filter set to "Standard" and a list of 1 record for "100 Cedar Rapids".

Step 4 Location is Inactive check box. If a location is no longer active you will make it inactive by checking the Location is Inactive box rather than delete it to retain all history information relating to the location and its associated departments.

3.2 Departments Tab

The Departments Tab is where you will enter the departments that reside in the location you just entered.

Step 1 Click the Departments tab.

Step 2 Click on the Add Item button on the lower left corner. This will open a screen on the right side where you will enter the department information.

- ◆ Enter the department number into the Department No field. This is a required field and the number must be unique; it can only be entered once for each location.
- ◆ Enter the department name into the Department Name field.
- ◆ Manager – this field can be used to associate the employee who is the manager of the department. Employees you wish to add as managers

must have a job type of “Manager” on their employee record. This will be covered in the employee section of this guide.

- ◆ Enter comments pertinent to the department into the Comments field.
- ◆ When you are satisfied with the information for your department record, press the Save button located at the bottom of the view.
- ◆ If you want to enter another department, press the Add Item button.

Discussion Points:

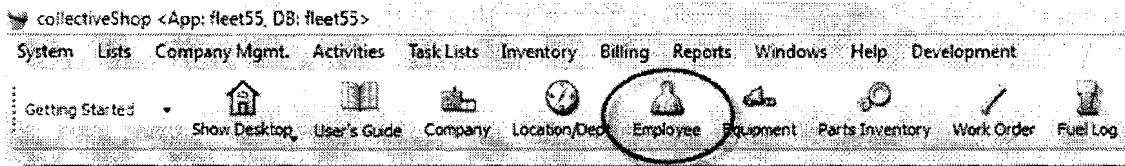
If your company has multiple locations with departments but does not have them defined, you will want to determine what would make sense from a metrics and reporting perspective. To do this, ask the following questions:

1. What departments do you need to send reports to?
2. What information does each of the departments need to report and record?
3. How do they currently group location or department numbers together?
4. Are the location and department groupings consistent across the departments requesting information from you? If not you will want to discuss this with all the departments and determine a reporting solution and standards.

4 EMPLOYEES

The employee view will capture the employees of your organization that are relevant to the fleet software. These may include your drivers, mechanics/technicians, managers of departments or anyone else you desire to track information about.

Step 1 Press the Employee icon located on the toolbar to open up the Employee view.



Step 2 The employee view is currently in new mode, ready for a new employee.

A screenshot of the 'Employee' view in 'Adding New Employee' mode. The window title is 'Employee'. At the top, there is a filter dropdown set to '<Standard>' and a search input field with the placeholder 'Enter text here to filter the Employee list'. Below this are navigation buttons for 'Apply', 'Edit', and 'Clear'. A record count shows '0 of 11 Records' and a '[New Employee]' button. A 'Print This' button is on the left. The main form area is titled 'Adding New Employee' and has a tabbed interface with 'Main' selected. The form fields include: 'Emp No', 'Job Title', 'First Name', 'Last Name', 'Location', 'Department', 'Address', 'Address 2', 'City', 'State', 'Postal Code', 'Shift', 'Phone', 'Alt Ph', 'Fax', 'Mobile', 'Email', 'DOB', 'Hired', and 'Rate' (set to 0.00). A large empty box on the right contains the text 'Click button below to load image'. At the bottom, there are buttons for 'What's This?', 'New', 'Save', 'Reset Changes', and 'Done'. The status bar at the bottom right indicates 'List filtered: Active Employees'.

Step 3 Main: Enter yourself as an employee

- ◆ Put your employee number in the Emp No field
- ◆ Select the Job Title “Driver” from the Job Title field. See Special Control: The drop list control for more information.
- ◆ Enter your First and Last names

- ◆ Enter your address, shift working, phone, email, date of birth, and hire date.
- ◆ Enter a dollar value in the Rate field, this will be used to populate the technicians rate on work orders.
- ◆ Enter remaining information as desired

Step 4 Job Titles: The titles associated with the employee will determine what the employee can be tied to in the system. For example, to be attached to a piece of equipment at the driver, the employee must have a job title of Driver, or to be listed as performing work on a work order, they must have a job title of Technician.

Step 5 Scheduling: Licenses and Certifications can be scheduled for each employee. When an item is coming due, it will show up in the To Do List and License/Certification Tasks views, both available from the Task Lists menu.

Step 6 Equipment/Driver association: All equipment that is currently assigned to the employee will be displayed in the Equipment tab.

Step 7 Emergency Contacts: Employees can have any number of emergency contacts listed for them.

Step 8 Details: The details section is a catch all for information you want to capture when there isn't a logical field to place it in. You can define any number of extra pieces of information using the Details section.

Step 9 Documents: Store copies of documents on record for the employee.

Step 10 Picture: Upload additional pictures of the employee.

Step 11 Release Info: When an employee is no longer active within your organization, you can mark them as Released.

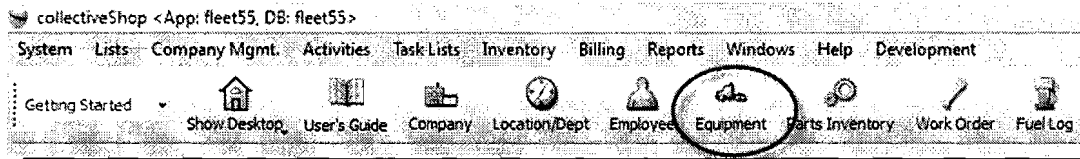
Step 12 When you are satisfied with the information for your employee record, press the Save button located at the bottom of the view.

Step 13 If you want to enter another employee, press the New button at bottom of the view to put view into New mode.

5 EQUIPMENT

The equipment view will capture all the vehicles and equipment that you want to manage using collectiveFleet.

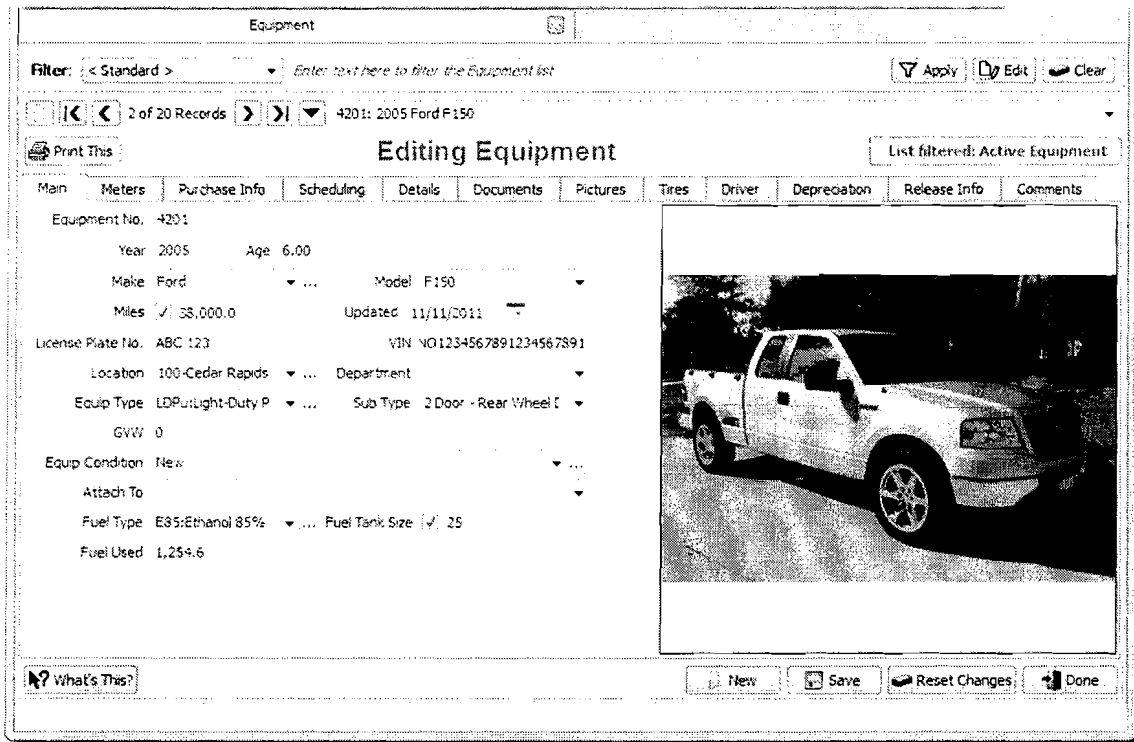
Step 1 Using the Desktop's toolbar, press the Equipment Icon to open up the Equipment view.



Step 2 The equipment view is currently in new mode, ready for a new equipment record to be entered. Enter a new vehicle into the system now. You can enter a vehicle you work with in your organization or your own personal vehicle.

- ◆ Enter the equipment number in the Equipment No. field.
- ◆ Use the Location drop list to select your location.
- ◆ Use the Dept drop list, the only departments that will be available are those associated with the location you choose. Select your department from the list.
- ◆ Pull down the Equip Type drop list and select the correct type for this equipment, or use the Quick Add button to add a new type.
- ◆ The equipment can have two meter readings. For example, the first could be odometer miles and the second could be engine hours.
- ◆ Enter the license number, VIN, Equipment Type and Sub Type, Gross Vehicle Weight, Equipment Condition, Fuel Type and Fuel Tank Size if they are known.
- ◆ Attach To: The Attach To field allows you to tie another piece of Equipment to a piece of Equipment already entered within the software. This allows you to have a piece of Equipment (Generator) that can be scheduled and maintained as if it were a stand-alone piece of Equipment, but understand that the piece of Equipment (Generator) is now a sub piece of equipment on a specified piece of Equipment. You will use the + sign in front of the main equipment to see its sub-equipment. You can also run the Equipment List Report from the Report menu which will list the equipment and its associated equipment on the report.

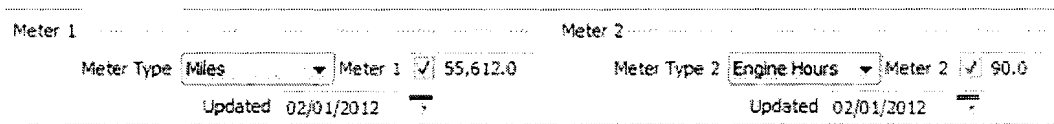
Step 3 When you are satisfied with the information for your equipment record, press the Save button located at the bottom of the view.



Step 4 Filter the equipment list to only show equipment that equals the equipment number you entered using the Filter Equipment List control at top of view.

- ◆ Change list showing <Standard> to be Equipment No.
- ◆ Press the Apply button when ready
- ◆ After viewing the equipment list filtered to just your equipment, press the Clear button on the far right of the Filter Equipment List control. All equipment in the system should now be available again.

Step 5 Meters Tab: Allows you to select two types of meters to track for the equipment and shows the quantity and date of the most current meter reading. Meter 2 will be Hours, using the drop list select Hours. To turn on Meter 2 check the check box next to the meter entry field, this will make the field available.



Step 6 Purchase Info: Capture information regarding the purchase of the equipment such as the cost, vendor purchased from, meter readings at time of purchase etc.

Step 7 Scheduling :

- ◆ Click on the PM Scheduling sub tab.

- ◆ Click Add Item, a new PM Schedule task record will open.
- ◆ Select a PM Service from the drop down; select the Meter Schedule Type option. Enter 100 in the Miles field.

Main | Service Pattern | Last Perf.

PM Service |

Service Schedule Options

Schedule Type Meter

Miles KM Eng. Hours

Svc. Hours Hub Other

Fuel

Make this Recurring

Schedule Set

- ◆ Add a 2nd PM Service; select the Meter or Elapsed Time Schedule Type option. Enter 100 in the Miles field. Select Months; enter 2 in the corresponding field.
- ◆ Save the equipment again. The equipment now has two scheduled services.

Step 8 Details: The details section is a catch all for information you want to capture when there isn't a field to place it in. You can define any number of extra pieces of information using the Details section.

Step 9 Documents: Store documents related to the equipment.

Step 10 Pictures: Store additional pictures of the equipment.

Step 11 Tires: If you are using the tire serializing function, the Tires tab shows the active tires on the equipment. This is for reference use only. Tires need to be mounted and dismounted using the tire serialization process and the work order module.

Step 12 Driver:

- ◆ Place your cursor directly on top of the red text "Select or type the Employee to add" at bottom of Driver List.

Add Driver | Select or type the Employee to add |

- ◆ Enter your last name or employee number. If your name does not appear, or multiple names match your entry, the Item Selector box will appear. You can either make a selection or use the Quick Add button to add a new record.

Step 13 Depreciation: Information regarding the depreciation of your equipment is managed here.

Step 14 Release Info: Store information from when the equipment was disposed of, track whether or not it is currently active.

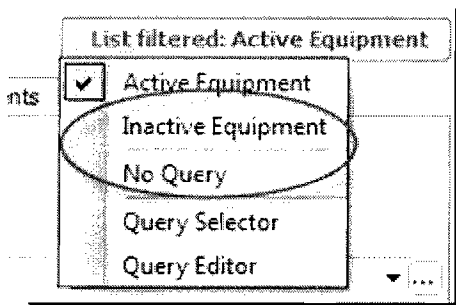
Step 15 Comments: Record any additional information about the equipment.

Step 16 Press the Save button at the bottom of the view

Step 17 If you want to enter more equipment, press the New button at the bottom of the view to put the equipment view back into New mode.

Special Notes:

Equipment that is marked inactive will be hidden from the equipment list by default. Under the Release Info tab, there is an “Equipment is Inactive” checkbox. Once this is checked, you will no longer see the equipment unless you specifically indicate to the system you want to see it. You can view inactive equipment by pressing the button labeled List Filtered: Active Equipment and either selecting Inactive Equipment or No Query to see everything.



5.1 Equipment Quick Meter Update

The Quick Meter Update view is a simplified view designed to expedite the updating of the meter readings for your fleet.

Quick Meter Update

Filter: < Standard > Enter text here to filter the Equipment list [Apply] [Edit] [Clear]

Equipment No.	Year	Make	Model	License Plate No.	Meter 1	VIN	Equip Type
12345	2010	Ford			7,526.0		
4201	2005	Ford	F150	ABC 123	55,612.0	VINNO1234567891234567891	LDPu:Light-Duty Pi...
4202	2002	Chevrolet	Astro	XYZ 4202	75,000.0	2C4GP54L51R356128	MVan:Mini Van
4203	2001	Dodge	Ram	XYZ 4203	1,000.0	2C4GP54L51R378995	LDPu:Light-Duty Pi...
4204	1997	GMC	Sonoma	CD 201	167,859.0	1A4GP54L49R341562	LDPu:Light-Duty Pi...
4205	2005	Dodge	Ram	1234 ABC	66,521.0	VINNO7894561237894561237	LDPu:Light-Duty Pi...
4206	2005	Ford	F150	OYV 123	43,027.0	VINNO7894561237894561237	LDPu:Light-Duty Pi...
4207	2005	Dodge	Intrepid	HJR 956	43,882.0	D45T1546G1DA64113E56163A	Auto:Automobile
4208	2005	Ford	Taurus	HJR 478	43,901.0	AD4896DF32S2R666R232R56T	Auto:Automobile

Editing Equipment [List filtered: Active Equipment]

Miles 66,521.0 Engine Hours 378.0

Updated 12/29/2011 Updated 12/07/2011

[What's This?] [Save] [Next] [Done]

- Step 1** Open the Quick Meter Update view by selecting it from the Activities menu option.
- Step 2** Select the equipment to be updated.
- Step 3** Update the first meter field to a new value
- Step 4** Press the tab key on your keyboard to place the focus on the Updated field
- Step 5** To set the date to the current date, hold in the Ctrl Key and press the letter T (for Today).
- Step 6** Once you have the meter and date set the way you want, click the Next button located at the bottom of the view
 - ◆ Pressing the enter key on your keyboard will also perform the same action as the Next button.
- Step 7** Once you have made all of the update, close the Quick Meter Update view

5.2 Equipment Meter Readings

The Meter Reading view shows the historical changes of meter values. The view only shows one equipment's meter readings at a time. The view is also filtered by default to show the last 30 days work of meter readings.

The screenshot shows a web application interface for editing meter readings. At the top, there's a title 'Equipment Meter Readings' and a filter section with a dropdown set to '< Standard >', a date range '01/07/2012 Through 02/06/2012', and buttons for 'Apply', 'Edit', and 'Clear'. Below the filter is a navigation bar with '1 of 2 Records' and a dropdown menu showing 'Equipment - 90.0 - 02/01/2012'. The main heading is 'Editing Meter Reading' with a 'No Query Selected' button to its right. The form fields are: 'Equipment' (4201: 2005 Ford F150), 'Source of Reading' (4201: 2005 Ford F150), 'Meter' (90.0), 'Meter Type' (Engine Hours), and 'Meter Updated' (02/01/2012). At the bottom, there are buttons for 'New', 'Save', 'Reset Changes', and 'Done', along with a 'What's This?' help icon.

- Step 1** Open the Equipment Meter Readings view by selecting it from the Activities menu option.
- Step 2** Locate the equipment drop list at the top of the view, click in the drop list field.
- Step 3** Enter the equipment number of the equipment you previously added to the system. After a short delay it should be selected and the list of meter readings will be refreshed to reflect the readings for your vehicle.

Special Notes:

The Meter Readings in this view will be created automatically when meter values are entered into the system through any of the associated views, the source of reading column will indicate which view the reading source was created from for ease of locating what you need. For example, when you create a work order or fuel up the vehicle, the date and meter information will be populated in the Meter Readings table. There may be times when you need to correct a reading if an incorrect entry was put into the system.

5.3 Meter Replacement

The Equipment Meter Replacement View is used when a meter replacement is required for equipment. When performing a meter replacement the scheduling set for the equipment will continue as normal based on internal calculations from the original meter being replaced to the new replaced meter reading.

The screenshot shows a web-based form titled "Adding New Meter Replacement". At the top, there is a "Filter" dropdown set to "< Standard >" and a text input field for filtering records. Below this are navigation buttons for "Apply", "Edit", and "Clear". A status bar indicates "0 of 0 Records" and "[New Meter Replacement] 02/28/2012, 0.0". The main form area is titled "Adding New Meter Replacement" and includes a "Main" tab. The form fields are: "Equipment" (a dropdown menu), "Date" (02/28/2012), "Time" (11:25 am), "Description" (a text area), "Meter Type" (Miles), "Original Meter" (checkbox checked, 0.0), and "New Meter" (checkbox checked, 0.0). At the bottom, there are buttons for "New", "Save", "Reset Changes", and "Done", along with a "What's This?" help icon.

- Step 1** Enter the equipment number that is receiving a new meter, enter a description of the change and select the type of meter.
- Step 2** Enter the original meter and the new meter. This will allow the system to calculate the total meters for the equipment.
- Step 3** Enter any comments regarding the replacement.
- Step 4** Save the record.

6 PARTS INVENTORY

collectiveFleet offers a comprehensive parts management module. You can manage parts that are stocked in one or more warehouses, or parts that are ordered on demand.

6.1 Adding a New Part

- Step 1** Open the Parts Inventory View using one of the methods previously covered.
- ◆ Create a new part by making up a Part Number and Description. Record your part number and description, this will be used during the work order section.
 - ◆ Use the Type field drop list and select Fluid. This will allow the part to be chosen when adding fluids to fuel logs.

- Step 2** Inventory tab: Allows you to set the part up to be tracked in different warehouses. Each warehouse can have its own reorder point, maximum quantity on hand etc, based on the usage in that specific warehouse.
- ◆ Click on the Add Item Button to add the part to a new warehouse.
 - ◆ Select the warehouse to assign the part to.
 - ◆ The reorder quantity, quantity on order, quantity allocated, and total cost will be calculated from open purchase orders for this part.
 - ◆ Enter the reorder point for this warehouse.
 - ◆ Enter the maximum quantity that should be kept on hand at this warehouse.

- Step 3** Cross Reference Tab: This tab allows you to indicate if another part can be used as a substitute if this one is not available. Example, a vehicle typically uses an AC Delco oil filter, but they are currently on back order, looking at the Cross Reference tab, you see that a Fram oil filter can also be used.
- Step 4** Comments: Enter any comments pertinent to the part.
- Step 5** Warranty: Entering warranty information on a part will allow the system to alert the user when a part is being replaced that it might still be under warranty.
- Step 6** Documents: Upload any documents pertinent to the part
- Step 7** Alternate Part Number: Use this tab when a manufacturer changes the number of a part, or if a part has different numbers for different manufacturers and can be used interchangeably.
- Step 8** Save the Part.
- Step 9** To enter another part, press the New button at bottom of the view to put view into New mode.

6.2 Purchase Orders

The Purchase Order view allows you to track all purchase orders, and apply the parts to inventory or directly to a work order.

- Step 1** Open the Purchase Order view, found under the Inventory menu.
- Step 2** On the Main tab enter the details of the PO.
- ◆ PO ID will auto-populate when the record is saved.
 - ◆ PO Number, enter the PO number assigned by accounting.
 - ◆ Enter a description of the purchase order.
 - ◆ Update the Create and Issued dates as needed.
 - ◆ Select the vendor the PO is for from the drop list. If the vendor is not listed, use the Quick Add button to create a record for this vendor.
 - ◆ Enter the invoice number if it is known.
- Step 3** Save the record
- Step 4** Click on the Parts tab
- Step 5** Click on the Add Item button on the bottom left

Step 6 Enter the information for the part you are adding to the Purchase Order

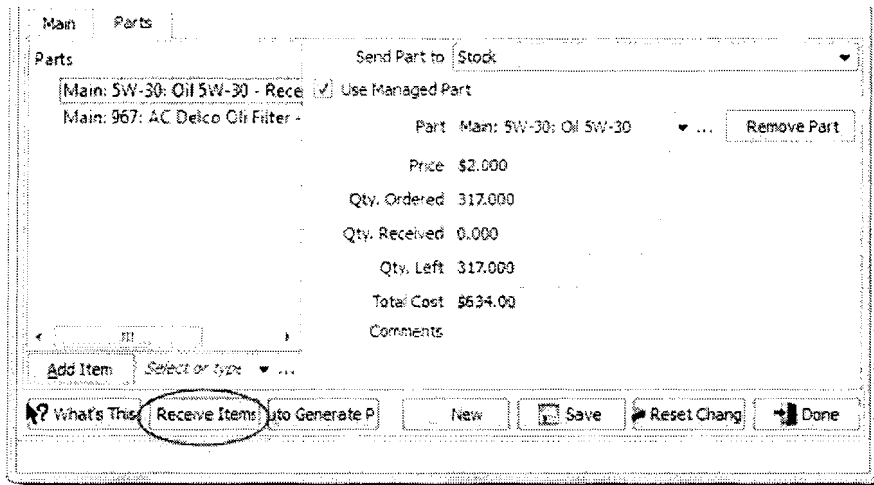
The screenshot shows a software window titled 'Parts' with a 'Send Part to' dropdown menu set to 'Stock'. A checkbox labeled 'Use Managed Part' is checked. Below this, there are several input fields: 'Part' (with a 'Remove Part' button), 'Price' (50.000), 'Qty. Ordered' (0.000), 'Qty. Received' (0.000), 'Qty. Left' (0.000), 'Total Cost' (50.00), and 'Comments'. At the bottom of the window, there are several buttons: 'Add Item', 'What's This', 'Receive Items', 'Auto Generate P', 'New', 'Save', 'Reset Chang', and 'Done'.

- ◆ If this is a one-time order of a part for a specific work order, change Send Part to field to Work Order. This will open fields for you to select the work order and work code the part is for.
- ◆ The Quantity Ordered field will auto populate with the quantity necessary to reach the Maximum On Hand quantity. Adjust the Quantity Ordered to match the PO.

Step 7 Continue using the Add Item button to add all of the parts that are on the Purchase Order.

Step 8 Save the Purchase Order

Step 9 Once the order is received, click on the Receive Items button to enter the parts into inventory.



- Step 10** This will open the Receive Items view for this purchase order. Click on the Parts tab.
- Step 11** Adjust the quantity received for the parts if necessary.
- Step 12** Save the record. The parts have now been added to inventory.

6.3 Receive Parts in One Step

If you do not use purchase orders you can quickly receive new parts using Receive Parts in One Step.

- Step 1** Open the Receive Parts in One Step view using the Inventory menu.
- Step 2** Enter a description for the record. This can be the date, the type of parts being received, etc.
- Step 3** Go to the Parts tab.
- Step 4** Using the Add Item button, enter the first part to be received.
- Step 5** Once you have selected the Part, the quantity received and price fields will auto-populate, adjust these fields as necessary.
- Step 6** Continue adding parts using the Add Item button until you have entered all of the parts you need to receive.
- Step 7** Save the record.

6.4 Inventory Adjustments

Occasionally you will need to adjust your inventory, or move it from one warehouse to another. This can be done one part at a time, or multiple parts can be adjusted through the batch process.

6.4.1 Single Part Adjustment

Step 1 Open the Inventory Adjustment view.

The screenshot shows a software interface for entering an inventory adjustment. The form is titled 'Main' and contains several fields:

- Batch:** A dropdown menu with a three-dot icon.
- Comments:** A text input field.
- Adj. Reason:** A dropdown menu with 'Missing' selected and a three-dot icon.
- Date:** A date picker showing '02/27/2012'.
- Part:** A dropdown menu with 'Main: 123: Grease' selected and a three-dot icon.
- Part Bucket:** A dropdown menu with '#25123: Grease, 07/26/2011, Qty: 2.000' selected.
- Description:** A text input field.
- Adj. Type:** A dropdown menu with 'Decrement' selected.
- Qty:** A text input field with '4.000' entered.

Step 2 Enter a reason for the adjustment, the part, and the part bucket.

Step 3 Select whether you are increasing or decreasing the inventory.

Step 4 Enter the number you need to adjust in or out. Do not use a negative number to decrease the inventory. The Adjustment Type field will determine whether to add or subtract.

Step 5 Save the record.

6.4.2 Inventory Adjustment Batch

Step 1 Open the Inventory Adjustments-Batch view.

Step 2 Click on the Parts tab, then click on the Add Item button

Step 3 The screen will open on the right for you to enter the part adjustment

Step 4 Continue using the Add Item button to add parts to adjust.

Step 5 Save the record.

Special Notes:

The Inventory tab allows you to define if the part is tracked in Inventory by checking the box labeled Track part in Inventory. When this box is checked, receiving items will increase inventory counts, and using parts in Work Orders or the Fuel Log modules will decrease quantity counts.

Discussion Points:

- Inventory Adjustments: Inventory counts can be adjusted or transferred from one warehouse to another using the Inventory Adjustments View.

7 FUEL LOG

The fuel log allows you to capture the details of each fill up. This allows you to track fuel costs by vehicle, monitor fuel efficiency and update the current meter readings.

The screenshot shows the 'Adding New Fuel Log' form. At the top, there is a filter section with 'Standard' selected and a date range of '01/29/2012 Through 02/28/2012'. Below this are navigation buttons and a record count of '0 of 0 Records'. The main form area is titled 'Adding New Fuel Log' and has a 'No Query Selected' button. The form is divided into several sections: 'Main' (with a 'Fluids' sub-tab), 'Fuel #' (set to '<Auto>'), 'Equipment' (a dropdown menu), 'Meter 1' (checked, 0.0), 'Meter 2' (unchecked), 'Date' (02/28/2012), 'Time' (12:00 am), 'Employee' (dropdown), 'Location' (dropdown), 'Department' (dropdown), 'Description' (checkbox for 'Filled from Inventoried Fuel'), 'Vendor' (dropdown), 'Fuel Type' (dropdown), 'Capacity' (Full Tank (Topped Off)), 'Units Used' (0.000), 'Cost Per Unit' (\$0.000), 'Receipt Amt.' (input field), 'Cost of Fill-up' (\$0.00), 'Fluid Cost' (\$0.00), 'Grand Total' (\$0.00), 'Eff.' (0.000), and 'Variance' (0.00). At the bottom, there are buttons for 'New', 'Save', 'Reset Changes', and 'Done'. A 'What's This?' help button is also present.

- Step 1** Open the Fuel Log view by selecting it from the Activities menu.
- Step 2** The Fuel # will auto-populate when the record is saved.
- Step 3** If the actual quantity, cost or meter at the time of fueling is not know, check the Estimated Entry box to indicate this is not actual information.

This is a close-up screenshot of the 'Adding New Fuel Log' form, specifically focusing on the 'Estimated Entry' checkbox. The checkbox is circled in red, indicating that it should be checked. The form shows the 'Equipment' dropdown menu, 'Meter 1' (checked, 0.0), 'Meter 2' (unchecked), 'Date' (02/28/2012), 'Time' (12:00 am), and 'Employee' (dropdown). The 'Capacity' is set to 'Full Tank (Topped Off)'. The 'Units Used' is 0.000, 'Cost Per Unit' is \$0.000, and 'Receipt Amt.' is an empty input field. The 'Cost of Fill-up' is \$0.00, 'Fluid Cost' is \$0.00, 'Grand Total' is \$0.00, 'Eff.' is 0.000, and 'Variance' is 0.00.

- Step 4** Enter the equipment number, meter reading, employee, location, and department.

Step 5 If the equipment was filled from an on-site tank or other inventoried fuel source, check the Filled from Inventory box. This will allow you to select the fuel part from inventory.



Step 6 If the equipment is not being filled from inventory, enter the vendor and fuel type.

Step 7 Select whether the equipment was filled to capacity, or partially filled.

Step 8 Enter the number of units used and the cost per unit.

Step 9 If any fluids, ie windshield washer fluid, oil etc, were added at the time of the fill up, click on the Fluids tab.

- ◆ Click on the Add Item button to open a new screen.
- ◆ Select the type of fluid and whether it was taken from inventory.
- ◆ Enter the amount of fluid used and the type of unit.
- ◆ Enter the cost per unit.

Step 10 Save the record.

Step 11 On the Main tab, check the total cost field. If the fill up was done at a vendor location, ensure the total cost matches the receipt. If not, you can check the Receipt Amt box and enter the amount from the receipt.'

Step 12 Save the record.

Special Notes:

If the date of the fill up is more recent than the meter reading on the equipment, the meters will be updated on the equipment. Or, if the meter being entered is lower than a previously dated entry, you will receive a message alerting you that there is a contradiction. You can cancel the entry or ignore and continue.

8 MAINTENANCE REQUEST SYSTEM

A Maintenance Request is an item submitted, usually by the driver, when the equipment is in need of repair but is not considered urgent enough to have the equipment taken to the shop immediately. The Maintenance Request view allows you to submit a new request, manage existing open requests, or browse through requests that have already been completed.

The screenshot displays the 'Adding New Maintenance Request' form within a web application. At the top, there is a filter dropdown set to '< Standard >' and a search input field with the placeholder text 'Enter text here to filter the Maintenance Request list'. To the right of the search field are buttons for 'Apply', 'Edit', and 'Clear'. Below the search bar, navigation icons and a record count '0 of 1 Records' are visible, along with a breadcrumb trail: '[New Maintenance Request] <Auto > - 02/06/2012'. The main title of the form is 'Adding New Maintenance Request', and a status indicator on the right says 'List filtered: Unassigned Maint. Req.'. The form itself is divided into two tabs: 'Main' and 'Technician Response', with 'Main' currently selected. The 'Main' tab contains several fields: 'Maint Req #' (value: <Auto>), 'Requester' (text input), 'Equipment' (dropdown), 'Request Date' (calendar icon, value: 02/06/2012), 'Suggested Due Date' (calendar icon, value: 02/06/2012), 'Brief Desc.' (text input), 'Priority' (dropdown, value: Medium), 'Status' (dropdown, value: Requested), 'Assigned WO' (dropdown), and 'Complete Date' (calendar icon). A 'Comments' section is also present. At the bottom of the form, there are buttons for 'What's This?', 'Create Work Order', 'New', 'Save', 'Reset Changes', and 'Done'.

- Step 1** To open the view, click on the Activities option, select Maintenance Request from the drop down menu.
- Step 2** The Maint Req # automatically generates when the record is saved.
- Step 3** Enter your employee number into the Requestor field.
- Step 4** Place your cursor in the Equipment field and key enter your equipment number. You can also use the Tab key to tab from the Requestor field to the Equipment field
- Step 5** Enter the request date; it will default to the current date.
- Step 6** If you would like to indicate to the mechanic a particular due date, you can use the Suggested Due Date field.

- Step 7** Use the Brief Descr. field to give a quick overview of the problem to the mechanic and if necessary, you can use the comments field to give a more complete explanation of the problem.
- Step 8** The priority field can be used to indicate the level of urgency placed on this particular request. It will be up to the mechanic or manager of the maintenance work to prioritize the physical work based off of the assigned priority. The Status field will default to Requested, indicating that that Maintenance has been requested, but that no action has yet been taken.
- Step 9** Use the Save button to save the record.

Special Notes:

The Assigned WO will be populated automatically when a Work Order is created to address the request, and the completed date will be populated after that Work Order is completed. Both of these fields are available for reference purposes.

The second tab labeled Mechanic Response contains one field that will contain text from the particular repair created within the assigned Work Order once the Mechanic has entered feedback into the repair comments section.

9 TO DO LIST AND OTHER TASK LISTS

When PM Services, Warranties, License/Certifications and other scheduled items become due, they will show up as task items on various Task List views and reports.

The screenshot shows a 'To Do List' window with the following data:

Due Date	Type	Task	Item	Department
02/06/2012	PM Service	LOF Lube, Oil & Filter	4209: 2006 Ford F150	
02/06/2012	Warranty Task	General Warranty	#53-11/30/2011 - 4215 - Main: 1-1234-119 S/ Truck Tire: \$350.00	102-Fleet Manager
02/06/2012	Warranty Task	GR: 90 day brake repair	#72-11/08/2011 - 4217 - Main: BP-101: Brake Pads: \$35.00	102-Fleet Manager
02/14/2012	Warranty Task	General Warranty	#69-03/14/2011 - 4209 - Main: 5W-30: Oil 5W-30: \$25.00	201-Transportation
02/16/2012	PM Service	LOF Lube, Oil & Filter	4208: 2005 Ford Taurus	104-Parts
02/19/2012	PM Service	TR: Tire Rotation	4209: 2006 Chrysler Town & Country	201-Transportation

Request Date	Maint Req #	Priority	Requester	Equipment	Brief Desc.	Suggested Due Date	Status	Assigned WO
02/06/2012	5	Medium	102 - Jones, Alyssa	4204: 1997 GMC Sonoma	check air conditioner	02/06/2012	Requested	
11/11/2011	4	High	108 - Johnson, Seth	4203: 2001 Dodge Ram	Defrost not working	11/11/2011	Requested	

Buttons: Perform Task, Open Communications, Print Tasks, Refresh

Checkbox: Show Maintenance Requests Done

Any item that is currently coming due can be performed by using the Perform Task button. Depending on the type of scheduled item, it may be a work order, license or registration completion log, or simply marking a warranty item as expired.

Maintenance Requests can also be seen on the To Do List by checking the Show Maintenance Requests check box as shown.

When a Work Order is open for an item the Current WO column will be populated with the work order number and open date. When the work order is completed and closed the item will be rescheduled.

10 WORK ORDERS

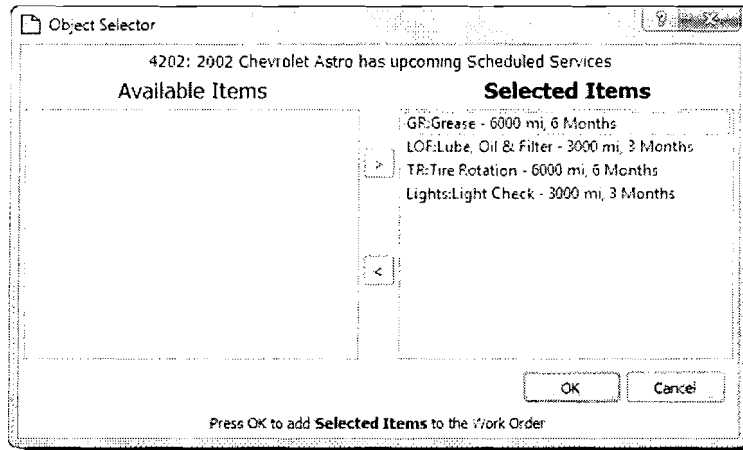
The work order view manages all services and repairs performed on your equipment, including labor charges and part usage.

10.1 Create a Work Order Manually

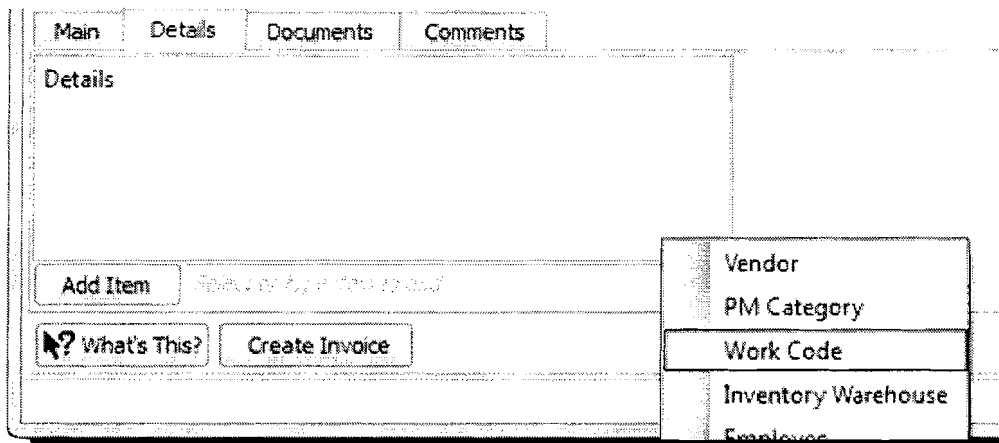
Step 1 Using the Desktop's toolbar, select Work Order

Step 2 Place your cursor in the Equipment field and key enter your equipment number.

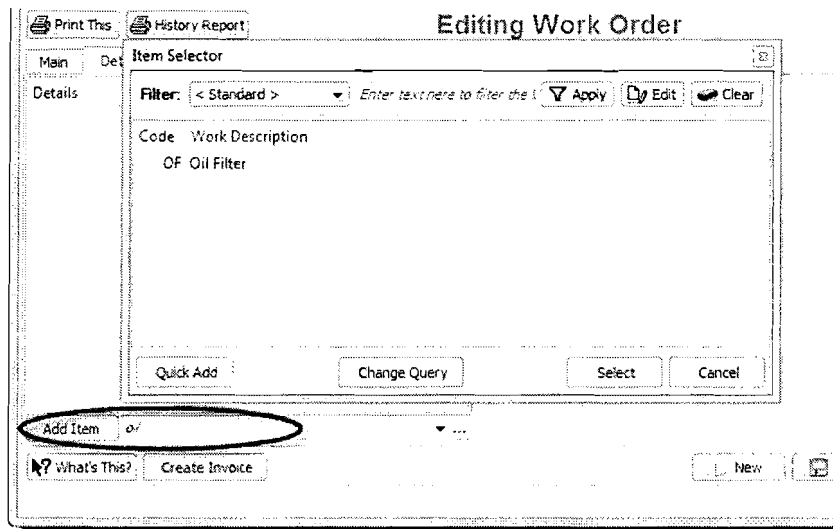
- ◆ If there is maintenance due on the equipment, a box will appear with a list of items. If you wish to complete these tasks now, click OK and they will be added to the work order. If you only want to do select tasks, move the tasks to NOT be done to the Available Items box on the right using the arrows.



- Step 3** Enter an estimated meter entry in the Meter 1 field.
- Step 4** Click on the Details tab.
- Step 5** Click on the down arrow to the right of the Add Item button located at the bottom of the Details list to see a list of everything that can be added to a work order.
- Step 6** Select Work Code



- Step 7** Place your cursor in the edit area next to the Add Item button and type in the word "oil".



- Step 8** Click Add Item and select Add WO Detail: Part from the drop list.
- Step 9** Enter the Part.
- Step 10** Repeat these steps to add additional parts or labor to the work order.
- Step 11** When you are satisfied with your work order, press the Save button to save your work order to the system.

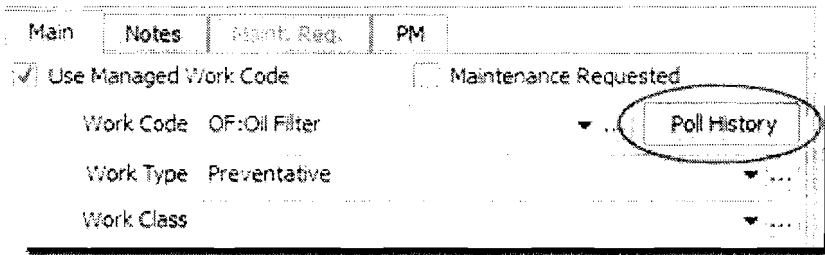
Work orders can also be created from the To Do List.

- Step 1** Open the To Do List.
- Step 2** Find the scheduled items you entered for your equipment.
- Step 3** Select one of the items.
- Step 4** Click on the Perform Task button on the lower left corner and select the Create Work Order option.

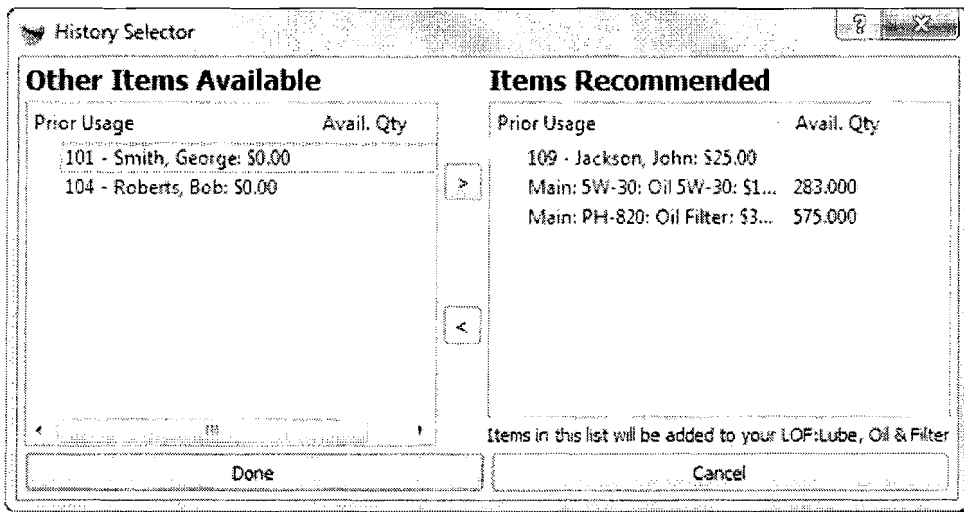
10.2 Poll History

Poll History allows you to quickly add labor and parts to a work code when that work code has been performed on the equipment in the past.

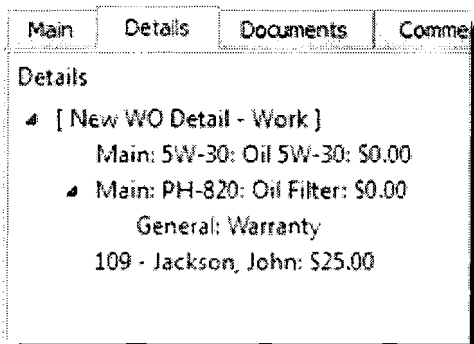
- Step 1** Add the work code to the work order as you did in section 9.1, steps 6-8
- Step 2** Click on the Poll History button to the right of the Work Code.



Step 3 A box will appear with Items Recommended that have been used to complete this work code on this vehicle in the past.



Step 4 Use the arrows to move items to or from the Items Recommended box. Once you have the correct items in the box, click the Done button and the items will be populated on the work order.



Step 5 Click on each items to update quantities or cost as needed.

Special Notes:

- ◆ Closed work orders do not show in the work order list at top of view by default.
- ◆ To see closed work orders, click on the red text button labeled List Filtered:
- ◆ Open Work Orders and change to Closed work orders.
- ◆ Selecting No Query will show every work order in the system.

10.3 Poll Scheduled Items Within – OPT Button

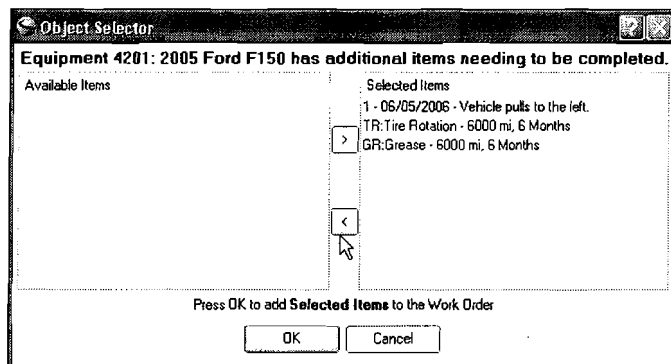
On the main tab of the work order the Opt button is located on the right side of the equipment field. When selected it will provide the Poll Scheduled Items Within user entry box. When set, the system will prompt the user when additional scheduled items are within the time frame and allow them to add them to the work order. This will allow you to perform as many items as possible when you have the equipment down for a work order whether it is for a scheduled item or in for unscheduled repair work.

The screenshot shows the 'Main' tab of a work order form. The 'Equipment' field is '4203: 2001 Dodge Ram'. The 'Description' is 'LOF PM Service'. The 'Status' is 'Scheduled'. The 'Location/Dept.' is 'Cedar Rapids' and '103-Delivery'. The 'Miles' is '17996.1' and 'Open Date' is '06/13/2006'. The 'Opt' button is highlighted. A dialog box titled 'Poll Scheduled Items Within...' is open, showing a list of elapsed items: Elapsed Days (50), Elapsed Miles (500), Elapsed Hours (500), Elapsed Kilometers (200), Elapsed Hubometer (200), Elapsed Fuel (500), and Elapsed Other (0). The dialog box has '>' and '<' buttons. At the bottom of the form, there are buttons for 'What's This?', 'Create Invoice', 'Editing Selected Work', and 'Done'.

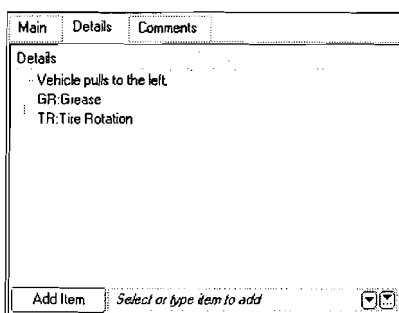
This information is set for your entire fleet. It can be reset at anytime as necessary.

Enter the Elapsed time periods you deem acceptable for you fleet to perform additional scheduled items when they fall into these ranges.

When you open a work order, whether it is from the To Do List or PM/Inspection Task list or from the work order view and you choose equipment that has items falling into these ranges scheduled to be performed you will receive the Object Selector box where you can use the > or < buttons to select the additional items you wish to add to the work order. If there is a Maintenance Request unassigned for the matching equipment on the work order, the Object Selector box will contain that item as well, as shown.



When you use the OK button the selected items will be automatically added to the Details tab of the work order.



Discussion Points:

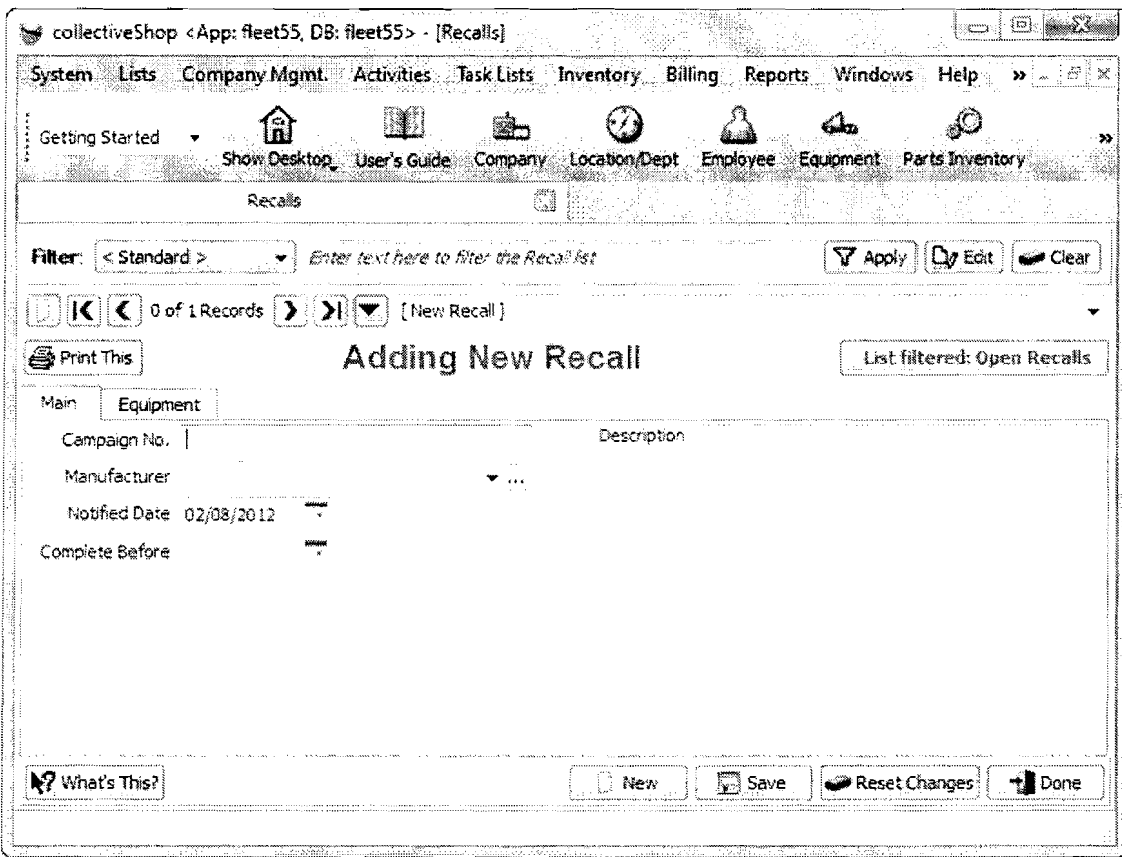
- **Part Warranties:** Warranties can be added to parts using the Part Warranty tab of the part. You can establish and set up what warranties you want to use. The scheduling is set up just like setting scheduled items for your equipment. When a part is added to a work order matching one whose warranty has not expired yet the user receives a message from the system indicating that the part is still under warranty.
- **Unmanaged Parts:** Parts that you will never add to your inventory can be added to a work order by un-checking the Use Managed Part check box on the part. When this is done it changes the capture fields where the part description, price, etc. can be captured. Unmanaged parts will be included in the poll history information.
- **External Vendor check box:** When you will not be performing the work in house and need to send your equipment to a vendor use the External Vendor check box. When checked the Vendor, Invoice # and PO # fields will be made available for user entry.
- **Accident Tracking:** If the work order is being performed as the result of an accident and you have entered an accident record into the system, use the Accident drop list to select the accident you need to associate to this work order.

- **Recalls:** When the work order is opened automatically as the result of creating a recall the Recall field will be automatically populated. Please refer to the recall section of this manual for detail.

11 CREATING AND MANAGING RECALLS

The Recall view allows you to enter a manufacturer's recall and attach the affected equipment to it, manage existing open recalls and their corresponding work orders, or browse through recalls that are still open or have already been completed.

11.1 Open the Recall

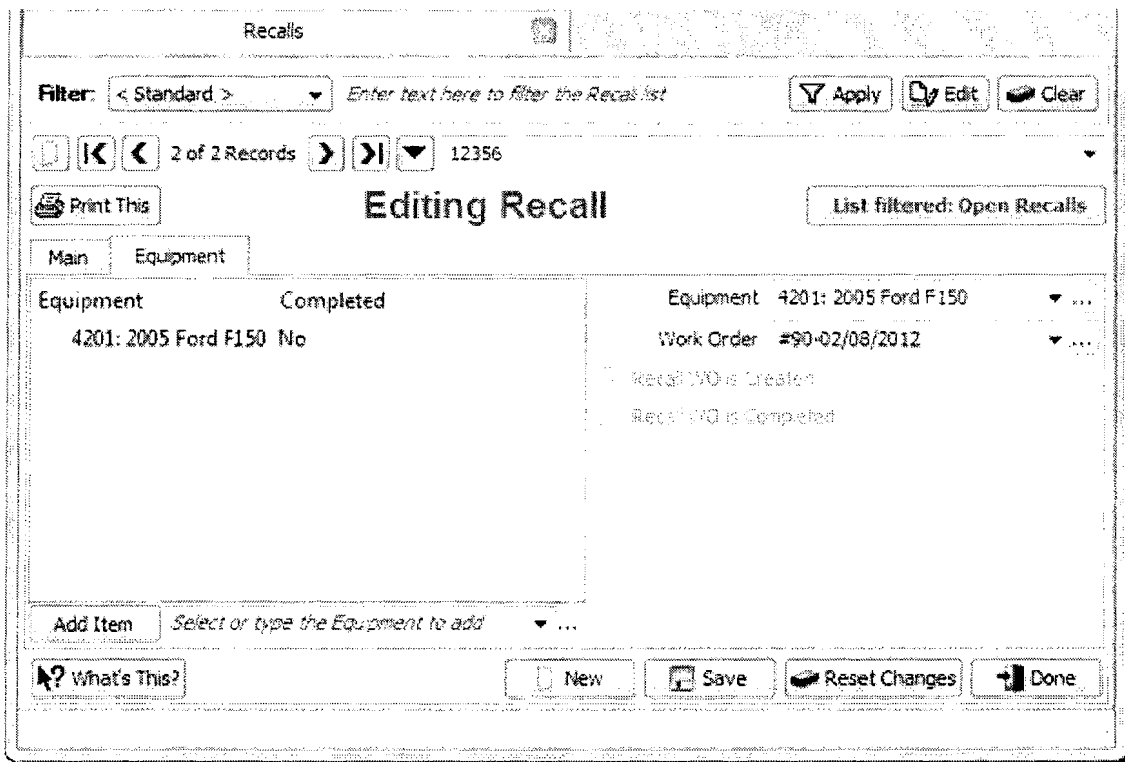


- Step 1** To open the view, go to the Menu Bar, click on the Activities option, select Recalls from the drop down menu.
- Step 2** Enter the Campaign No. that has been provided by the manufacturer to assist with tracking the recall in the system, the manufacturer responsible for the recall, the date you were notified of the recall and the date the recall must be completed by.
- Step 3** Use the description field to enter the description provided by the manufacturer and any other notes you wish to include on the Work Order(s) that will be created automatically by the system when you attach the equipment affected by the recall and save the record. The Description

field on the Recall view populates the Work Order main tab comments field.

- Step 4** Click on the Equipment tab. The equipment tab is where you will assign all equipment that will be affected by the recall; you can assign an unlimited amount of equipment to the recall
- Step 5** Click on the Add Equipment button located on the lower left corner of the Equipment window.
- Step 6** Type in your equipment number or select it from the drop list.
- Step 7** Use the Save button to save your Recall.

When you use the Save button to save the recall, the system will automatically assign and create a work order for each piece of equipment that has been included. The Recall WO is Created check box has been automatically checked.

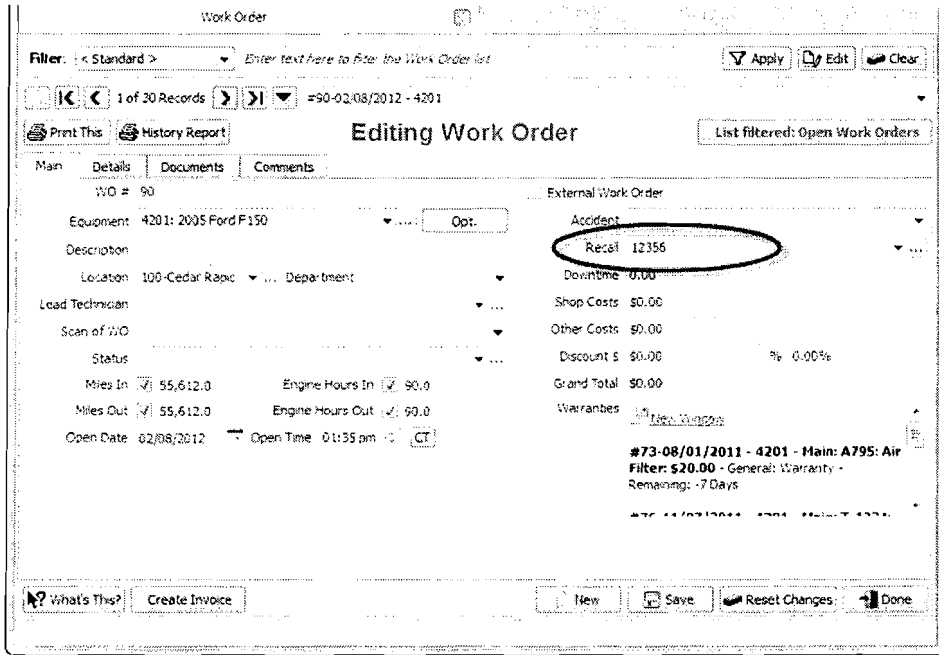


- Step 8** Go to the Work Order view and select the Work Order with the number that was auto-populated in the Recall view for your equipment.

11.2 Recall Work Orders

The Work Order has been auto-populated with the equipment information from the equipment view.

The Recall field will be populated with the campaign number and the complete before date.



See the Work Order lesson for more details and instructions regarding work orders.

11.3 Completing the Recall

When every work order that has been created as the result of the recall has been closed the system will consider the Recall campaign closed. When you close the recall view and reopen it, the now closed campaign will not be included in the object list of the recall view. By default it only shows the open recalls.

The Recall Equipment Tab will appear as below:

The screenshot shows a software window titled "Editing Selected Recall". At the top, there are two tabs: "Main" and "Equipment", with "Equipment" selected. The window is divided into several sections. On the left, there is a table with two columns: "Equipment" and "Completed". The table contains two rows of data: "4201: 2005 Ford F150 Yes" and "4207: 2005 Ford E150 Yes". Below the table is an "Add Equipment" button with a dropdown menu containing the text "Select or type the Equipment to add". On the right side, there are two input fields: "Equipment" with the value "4207: 2005 Ford E150" and "Work Order" with the value "11 - 08/08/2006". Below these fields are two checkboxes: "Recall WO is Created" and "Recall WO is Completed", both of which are checked. At the bottom of the window, there is a toolbar with a "What's This?" icon, the title "Editing Selected Recall", and four buttons: "New", "Save", "Reset Changes", and "Done".

On the left side the Completed field will be populated with Yes. On the right side of the view the Recall WO is Completed check box has been automatically checked for you, this field is not accessible by the user.

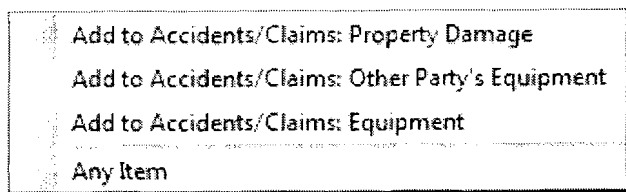
Recalls will not populate the Last Performed tab of the equipment view for the equipment that has been included in the recall.

12 ACCIDENTS/CLAIMS

The Accidents/Claims view allows you to track all of the details pertaining to the incident for your equipment and employees and the equipment and employees of any other parties involved. In addition, the accident can be tied to any work orders necessary to make repairs to the equipment.

The screenshot shows the 'Adding New Accidents/Claims' form. At the top, there is a filter dropdown set to '< Standard >' and a search box. Below that are navigation buttons for 'Apply', 'Edit', and 'Clear'. The form title is 'Adding New Accidents/Claims' and it indicates 'List filtered: Active Accidents'. The form is divided into several sections: 'Main' (with tabs for Damages, Work Orders, Injured, Witnesses, Police, Towing, Notes, Narrative, Pictures, Documents), 'Claim Number', 'Description', 'Date' (02/28/2012), 'Time' (12:00 am), 'Accident Location' (County, City, Address), 'Units Involved' (0), 'Total Injured' (0), 'Hit and Run' checkbox, 'Accident Type', and 'Main Picture'. There is also an 'Estimates' section with fields for 'Your Equip Est.', 'Other Equip Est.', 'Property Est.', 'Estimate', 'Your Equip Total', 'Other Equip Total', 'Property Total', and 'Total Cost'. At the bottom, there are buttons for 'New', 'Save', 'Reset Changes', and 'Done'.

- Step 1** Open the Accidents/Claims view under the Activities menu.
- Step 2** Enter the Claim Number, Description, Location and Accident Type.
- Step 3** Click on the Damages tab.
 - ◆ Click on the Add Item and select what to add the damages to, Property, Other Parties Property or Equipment



- ◆ The screen will open on the right to enter the details of the damage to the property or equipment, enter as much information as you have.
- ◆ Continue using the Add Item button to add damages.
- ◆ Save the record.

Step 4 Work order tab: If work orders have been opened, you can use the Add Item button to add the work orders to the accident. If the work orders have not been created, you can add them from the Work Order view by selecting the accident/claim number.

Step 5 Injured: If there were injuries sustained due to the accident, you can record the details on this tab.

- ◆ Click on the Add Item button to open a new record.
- ◆ Enter as much information as you can about the person who was injured on the Main tab.
- ◆ Click on the Notes tab and record any additional details about the injuries.
- ◆ Save the record.

Step 6 Witnesses: Use this tab to capture contact information and statements from witnesses.

The screenshot shows a software interface with a tabbed menu at the top. The 'Witnesses' tab is active, and within it, the 'Main' sub-tab is selected. The 'Main' sub-tab contains the following fields: First Name, Middle Initial, Last Name, Address, Address 2, City, State (with a dropdown arrow), and Postal Code. To the right of these fields, there are fields for Day Phone, Gender (with a dropdown menu showing 'Unknown'), and Birth Date. The 'Statement' sub-tab is also visible and appears to be empty. Other tabs in the main menu include 'Work Orders', 'Injured', 'Police', 'Towing', 'Notes', and 'Narrative'.

- ◆ Use the Add Item button to create a new witness entry.
- ◆ Enter the contact information on the Main tab the opens on the right.
- ◆ Enter comments from the witness on the Statement tab.
- ◆ Save the record.

Step 7 Police: This tab can be used to record information for the responding officers including name, phone number and badge number. Use the Add Item button to add as many records as needed to capture the police information.

- Step 8** Towing: Use this tab to capture the contact information for the towing service if it is needed. Use the Add Item button to add multiple records if several pieces of equipment are towed.
- Step 9** Notes: Enter any additional notes about the accident or claim that have not been captured.
- Step 10** Narrative: Describe the accident.
- Step 11** Pictures: Store pictures of the damage to equipment or injuries sustained in the accident.
- Step 12** Documents: Upload documents pertaining to the accident, including scans of the police report, insurance documents etc.

13 TRAFFIC VIOLATIONS

The Traffic Violations view allows you to document and track violations that occurred in company equipment.

The screenshot displays the 'Traffic Violations' application interface. At the top, there is a title bar 'Traffic Violations' and a filter section with a dropdown menu set to '< Standard >', a text input field for filtering, and buttons for 'Apply', 'Edit', and 'Clear'. Below the filter is a navigation bar showing '0 of 8 Records', a date selector for '02/28/2012', and a 'No Query Selected' button. The main content area is titled 'Adding New Traffic Violations' and features two tabs: 'Main' and 'Violation'. The 'Main' tab is active and contains a form with the following fields: 'Driver' (a dropdown menu), 'Date' (set to '02/28/2012'), 'Equipment' (a dropdown menu), and 'Total Cost' (set to '\$0.00'). At the bottom of the interface, there is a 'What's This?' help button and a row of action buttons: 'New', 'Save', 'Reset Changes', and 'Done'.

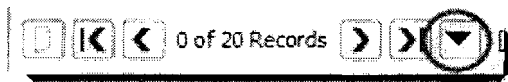
- Step 1** Open a New Traffic Violation by selecting the view from the Activities menu.
- Step 2** Select the driver, date and equipment on the Main tab.
- Step 3** Click on the Add Item button on the Violation tab.
- Step 4** Select the Violation Type, enter the Ticket Number, Cost and Comments regarding the violation.
- Step 5** Save the record.

14 REPORTS

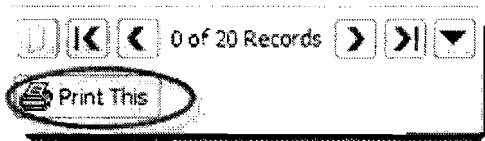
Reports can be run from several areas of the application, then exported to email, a PDF file or a .csv file for additional modification.

To run a report:

1. From the Desktop, select Reports from the menu bar.
2. In a View, click on the down arrow next to the Object Selector bar.

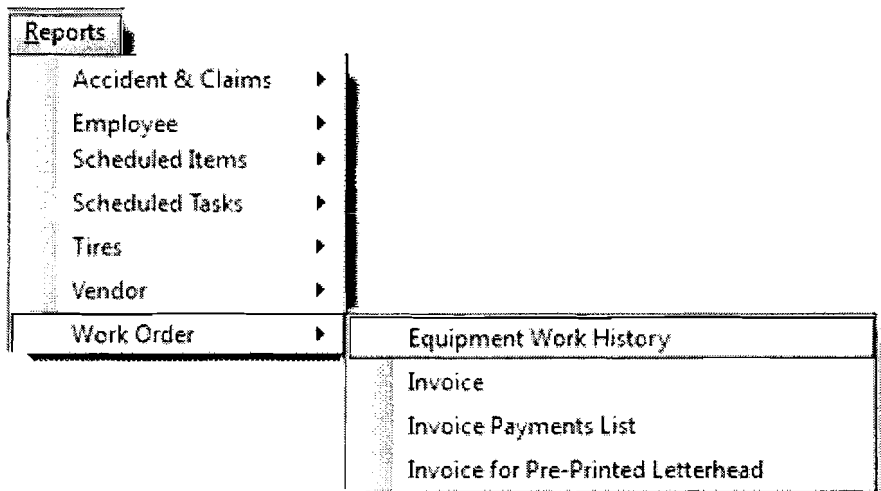


3. In a View, click the Print This button below the Object Selector bar

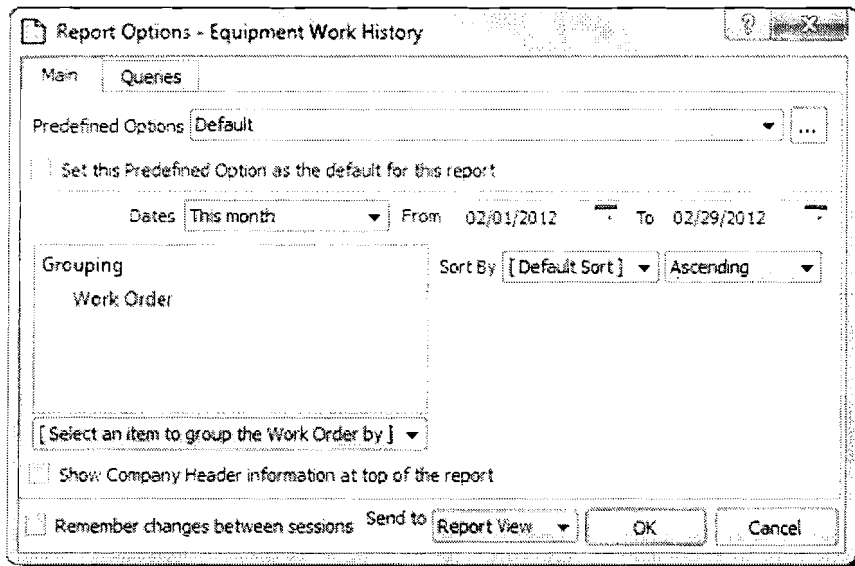


Once you have selected a report to run, you will be prompted to choose the criteria of the report. In this example we will run an Equipment History Report.

- Step 1** Select the Equipment History Report from the Reports/Work Order Menu



Step 2 The Report Options box will appear.

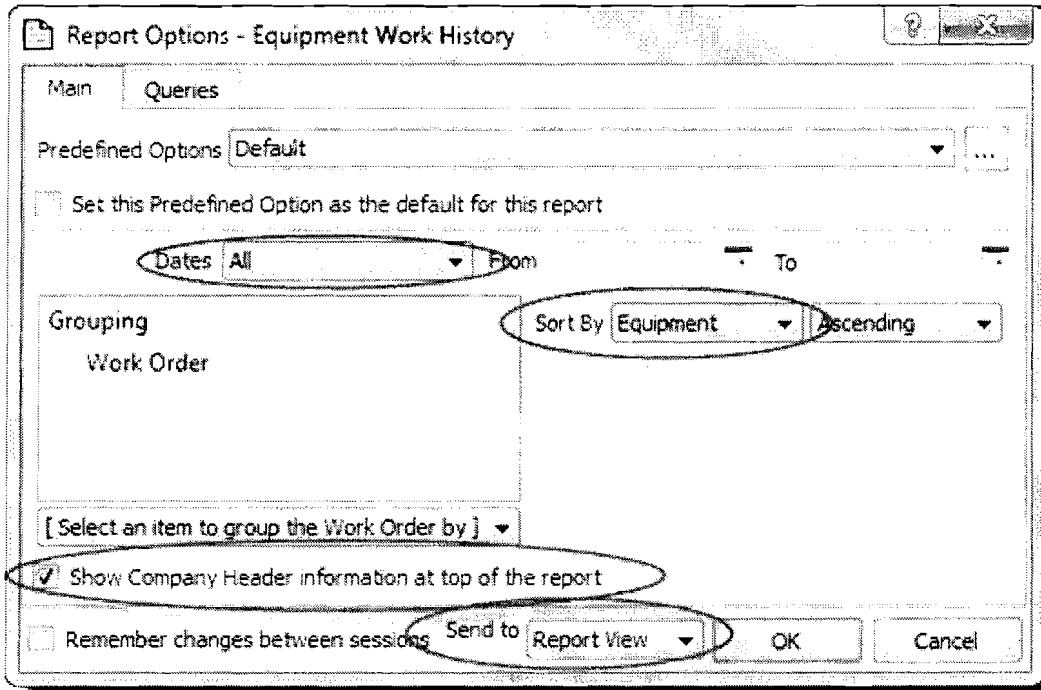


Step 3 Select the date range you want to run the report for. There are several predefined options, or you can customize the timeframe by entering dates.

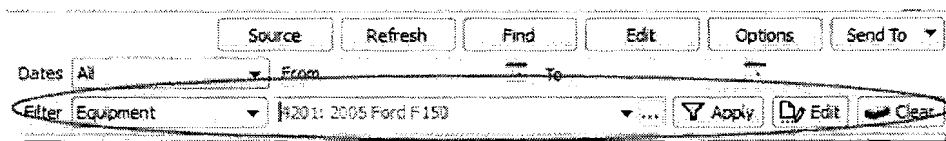
Step 4 Select the field to sort the report by.

Step 5 If you would like the report to appear with the company information at the top, check the Show Company Header information at the top of the report box.

Step 6 Select how you would like to view the report from the Send To drop down. If you view the report in Report View, you will still have the option to export or print it.

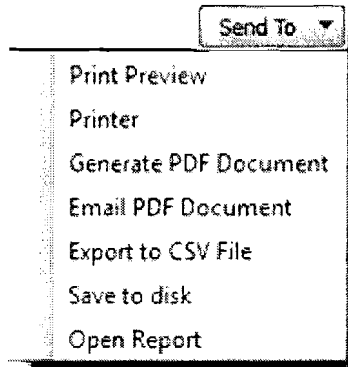


- Step 7** Once the report is run, it can be further filtered using the filter menu.
- ◆ Change the filter drop list to Equipment
 - ◆ Enter an equipment number in the open text field
 - ◆ Click Apply



- ◆ To clear the filter, click Clear

- Step 8** The report can also be exported by clicking on the Sent To button and selecting the type of export.



COLLECTIVE DATA
END USER LICENSE AGREEMENT (EULA)

Agreement

This License Agreement is between Company, as defined below, and Collective Data Incorporated (Collective Data), incorporated in the state of Iowa having a place of business at 230 2nd St. SE Ste. 414, Cedar Rapids, IA 52401.

1. Definitions

- 1.1 “Application Server” means the portion of the Software Product that acts as the license authentication and application server used in the Software Product.
- 1.2 “Client Application” means the portion of the Software Product that contains the interface used by the User to interact with the Application Server.
- 1.3 “Company” means the company, entity or individual whose funds are used to pay the license fee or who has otherwise acquired the Software Product.
- 1.4 “License Fee” means the amount of money listed in Exhibit A and received by Collective Data for the License granted below.
- 1.5 “License Period” means the time period listed in Exhibit A for which the License Fee has been paid for the License granted below.
- 1.6 “Software Product” means both the Application Server and Client Application and includes the computer software and associated media, printed materials, and “on-line” or electronic documentation, including without limitation any and all executable files, add-ons, tutorials, and help files, and excludes all files containing source code.
- 1.7 “Support Services” means services provided by Collective Data under a separate agreement between Collective Data and Company related to ongoing support and maintenance.
- 1.8 “Use” means storing, loading (whether into temporary memory (i.e., RAM) or into permanent memory (e.g., hard disk, CD-ROM or other storage device)), installing, executing or displaying the Software Product.
- 1.9 “User” means an employee of Company who Uses the Software Product. Other agents or contractors of Company are excluded from the definition of User. See Exhibit A for the number of licensed Users.
- 1.10 “Updates” means all modifications to the Software Product such as bug fixes provided by Collective Data at its discretion and represented by a change in the version number to the right of the right most decimal point. Updates do not include new modules or new software products.
- 1.11 “Upgrades” means major version changes of the Software Product and represented by a change in the version number to the left of the right most decimal point. Upgrades do not include new modules or new software products.
- 1.12 “Vehicle” means a motor vehicle to be tracked with the Software Product. See Exhibit A for the number of licensed Vehicles.
2. **Grant of License** Collective Data grants Company the non-exclusive, non-sub-licensable, limited right 1) to install one copy of the Application Server on one computer or virtual machine owned or controlled by the Company; 2) to install an unlimited number of copies of the Client Application; 3) to permit up to the number of Users to Use the Software Product for which the License Fee has been paid for the License Period; and 4) to track up to the number of Vehicles with the Software Product for which the License Fee has been paid for the License Period. Company may make routine backups of any database

associated with the Application Server, however, Company may not may make archival copies of the Application Server. All rights not specifically granted under this License are reserved by Collective Data.

3. Restrictions

3.1 Company agrees, except as expressly permitted in the License, the Software Product may not be used, copied, translated, redistributed, retransmitted, published, sold, leased, marketed, sublicensed, assigned, disposed of, encumbered, transferred, altered, modified or enhanced, whether in whole or in part. Company may not remove any proprietary notices, marks or labels from the Software Product.

3.2 To the extent that Company has access to the source code of Software Product, Company acknowledges that the source code remains a confidential trade secret of Collective Data. Company agrees that it has no license whatsoever to the source code and shall not disclose the source code under any circumstances or to otherwise inspect, copy, distribute, publish, display or modify the source code, nor compile or assemble the source code into executable files.

3.3 Company agrees not to reverse-engineer, de-compile or disassemble the Software Product, or make any attempt to discover the source code to the Software Product, except and only to the extent that such activity is expressly permitted by applicable law notwithstanding this limitation.

3.4 Company agrees to not attempt to break or evade any access controls, copy-control protections or encryption utilized in the Software Product.

3.5 Company agrees not to assist others in doing what the Company is prohibited from doing.

4. **Updates and Upgrades** Company shall have no right to receive Updates or Upgrades under this License Agreement. However, to the extent that Company does receive Updates or Upgrades from Collective Data as part of Support Services, those Updates and Upgrades shall be considered part of the Software Product and Company's rights in Updates and Upgrades shall be governed by the then existing version of this License Agreement.

5. Ownership

5.1 Title, ownership rights and intellectual property rights in and to the Software Product shall remain with Collective Data and are protected by US and international laws and treaties. The Software Product is licensed, not sold. There is no transfer to Company of any title to or ownership of the Software Product.

5.2 Title, ownership rights and intellectual property rights in data stored in the Software Product shall remain with Company.

6. **Transfer of Software Product** Company may transfer all Company's rights under this License Agreement on a permanent basis only, provided Company 1) retains no copies, 2) Company transfers the License Agreement, the corresponding serial number (if applicable) and all the Software Product (including without limitation all component parts, media and printed materials, and any upgrades), and 3) the recipient agrees to all the terms and conditions of this License Agreement. If the Software Product incorporates Upgrades, any transfer must include the latest release, all prior versions and any prior products used to obtain the Software Product.

7. **Termination of License** This License Agreement is in effect until terminated or the end of the License Period. Company may terminate it at any time by destroying the Software Product and all copies Company has made. Without prejudice to any other rights, Collective Data may terminate this License Agreement if Company fails to comply with any term or condition of this License Agreement. Upon termination or the end of the License Period, Company agrees to destroy the Software Product and all copies Company has made.

8. **Access by Collective Data** Collective Data shall have no right to access the Software Product unless access is granted by Company.

9. **Reports and Audit Rights** Company shall institute reasonable measures to ensure compliance with the terms and conditions of this License Agreement. Upon Collective Data's reasonable request, Company agrees to provide reports relating to Company's use of the Software Product as necessary to demonstrate Company's compliance with the terms and conditions of this License Agreement. Company further agrees that Collective Data has the right, upon reasonable prior notice, to audit Company's records and inspect Company's facilities to verify Company's compliance with the terms and conditions of this License Agreement, in particular to insure that no more than the number of licensed Vehicles are being tracked by the Software Product.

10. **Software Product Limited Warranty** To the original customer only, Collective Data provides the following warranties:

10.1 **Limited Warranty** COLLECTIVE DATA WARRANTS THAT FOR AS LONG AS A SUPPORT AGREEMENT IS IN PLACE BETWEEN COLLECTIVE DATA AND COMPANY ("WARRANTY PERIOD") AS EVIDENCED BY COMPANY'S RECEIPT OR OTHER PROOF OF PURCHASE (i) THE SOFTWARE PRODUCT, UNLESS MODIFIED OR OTHERWISE ALTERED BY COMPANY, WILL PERFORM SUBSTANTIALLY IN ACCORDANCE WITH THE ACCOMPANYING WRITTEN MATERIALS, AND (ii) THE MEDIA ON WHICH THE SOFTWARE PRODUCT IS FURNISHED, IF ANY, WILL BE FREE FROM DEFECTS IN MATERIALS AND WORKMANSHIP UNDER NORMAL USE. Collective Data does not warrant that the Software Product will meet Company's requirements or that Use of the Software Product will be uninterrupted or error-free. Collective Data is not responsible for problems caused by changes in the operating characteristics of computer hardware or computer operating systems which are made after the release of the Software Product, nor for problems in the interaction of the Software Product with non-Collective Data software products. Some jurisdictions do not allow limitations on duration of an implied warranty, so the above limitation may not apply to Company. The Limited Warranty gives Company specific legal rights. Company may have others.

10.2 **Exclusive Remedy** Collective Data's entire liability, and Company's exclusive remedy, shall be, at Collective Data's option, either (a) replacement of the defective media, (b) repair or replacement of the Software Product that does not meet Collective Data's Limited Warranty, or (c) return of the License Fee paid and termination of this License Agreement. This remedy is subject to return of the Software Product to Collective Data with a copy of Company's receipt within the Warranty Period or, solely for Software Product that was obtained electronically via "electronic software distribution", to delivery to Collective Data of a Collective Data -approved "certification of destruction" together with proof of purchase within the Warranty Period. This Limited Warranty is void if failure of the Software Product has resulted from accident, abuse or misapplication. Any replacement Software Product will be warranted for the remainder of the original warranty period or thirty (30) days, whichever is longer.

10.3 **Ownership** Collective Data warrants that it owns the Software Product or otherwise has sufficient rights to grant Company the license in this License Agreement.

10.4 **Third Party Claims** Collective Data warrants that, at the time of this License Agreement, it is not aware of claims that the Software Product infringes any right of a third party

10.5 **No Other Warranties** THE ABOVE WARRANTIES ARE EXCLUSIVE. TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, COLLECTIVE DATA AND ITS SUPPLIERS DISCLAIM ALL OTHER WARRANTIES AND CONDITIONS, EITHER EXPRESSED OR IMPLIED, INCLUDING, WITHOUT LIMITATION, IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, AND NON-INFRINGEMENT, AND THOSE ARISING OUT OF USAGE OF TRADE OR COURSE OF DEALING, CONCERNING THE SOFTWARE PRODUCT, AND THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES. NO ORAL OR WRITTEN INFORMATION OR ADVICE GIVEN BY COLLECTIVE DATA, ITS AGENTS, DEALERS, DISTRIBUTORS OR EMPLOYEES

SHALL INCREASE THE SCOPE OF THE ABOVE WARRANTIES OR CREATE ANY OTHER WARRANTIES.

10.6 No Liability for Damages EXCEPT FOR THE EXPRESS REMEDIES PROVIDED TO THE COMPANY UNDER THIS AGREEMENT, REGARDLESS OF WHETHER ANY REMEDY SET FORTH HEREIN FAILS OF ITS ESSENTIAL PURPOSE, TO THE MAXIMUM EXTENT PERMITTED BY APPLICABLE LAW, IN NO EVENT SHALL COLLECTIVE DATA OR ITS SUPPLIERS (OR THEIR RESPECTIVE AGENTS, DIRECTORS, EMPLOYEES OR REPRESENTATIVES) BE LIABLE FOR ANY DAMAGES WHATSOEVER (INCLUDING, WITHOUT LIMITATION TO: CONSEQUENTIAL, INCIDENTAL, INDIRECT, SPECIAL, ECONOMIC, PUNITIVE OR SIMILAR DAMAGES, OR DAMAGES FOR LOSS OF BUSINESS PROFITS, LOSS OF GOODWILL, BUSINESS INTERRUPTION, COMPUTER FAILURE OR MALFUNCTION, LOSS OF BUSINESS INFORMATION OR ANY AND ALL OTHER COMMERCIAL OR PECUNIARY DAMAGES OR LOSSES) ARISING OUT OF THE USE OF OR INABILITY TO USE THE SOFTWARE PRODUCT OR THE PROVISION OF OR FAILURE TO PROVIDE SUPPORT SERVICES, HOWEVER CAUSED AND ON ANY LEGAL THEORY OF LIABILITY (WHETHER IN TORT, CONTRACT OR OTHERWISE), EVEN IF COLLECTIVE DATA HAS BEEN ADVISED OF THE POSSIBILITY OF SUCH DAMAGES, OR FOR ANY CLAIM BY ANY OTHER PARTY. COMPANY ACKNOWLEDGES THAT THE LICENSE FEE REFLECTS THIS ALLOCATION OF RISK. In any event, if any statute implies warranties or conditions not stated in this License Agreement, Collective Data's entire liability under any provision of this License Agreement shall be limited to the greater of the amount actually paid by Company to license the Software Product and Five United States Dollars (US\$5.00), or, in the case of Support Services, providing such Support Services again or refunding the cost thereof. Because some jurisdictions do not allow the exclusion or limitation of liability for consequential or incidental damages, the above limitation may not apply to Company.

10.7 Infringement Indemnity Collective Data shall defend, indemnify, and hold Company harmless from and against any loss, liability, cost, or expense, including reasonable attorney's fees, which may be incurred by Company against any claims, actions, or demands by a third party alleging that the Software Product infringes a U.S. patent, copyright, or trademark, provided: (a) Company promptly notify Collective Data in writing of the claim; (b) Company provide documents clearly describing the allegations of infringement; (c) Collective Data has sole control of the defense of any actions and negotiations related to the defense or settlement of any claim; and (d) Company cooperates fully in the defense of the claim.

10.7.1 If the Software Product is found to infringe a U.S. patent, copyright, or trademark, Collective Data shall, in its sole discretion, take commercially reasonable steps to obtain the necessary rights or modify the Software Product. In the alternative, Collective Data may terminate this License Agreement and Company shall uninstall the Software Product. Collective Data's liability shall then be to indemnify Company as above and refund a pro-rata portion of any License Fee paid by Company for the Software Product. No refund shall be paid for any price paid by Company for Support Services.

10.7.2 Collective Data shall have no obligation to defend Company or to pay any resulting costs, damages, or attorneys' fees for any claims alleging direct or contributory infringement of the Software Product by (a) combination of or integration with a product, process, or system not supplied by Collective Data; (b) material alteration by anyone other than Collective Data; (c) use after Company have been notified of possible infringement; or (d) use after modifications are provided or this License Agreement is terminated.

11. US Government Restricted Rights The Software Product and documentation are provided with restricted rights. Use, duplication or disclosure by the Government is subject to restrictions as set forth in

subparagraph (c)(1)(ii) of The Rights in Technical Data and Computer Software clause at DFARS 252.227-7013 or subparagraphs (c)(1) and (2) of the Commercial Computer Software-Restricted Rights at 48 CFR 52.227-19, as applicable. The contractor/manufacturer is Collective Data, 230 2nd St. SE Ste. 414, Cedar Rapids, IA 52401, USA.

12. **Export Restrictions** Company may not export or re-export the Software Product or any underlying information or technology except in full compliance with all United States and other applicable laws and regulations. Company is solely responsible for its compliance with all United States and other applicable export laws and regulations. By Use of the Software Product, Company is specifically agreeing to the foregoing and Company is representing and warranting that Company is in compliance with such laws and regulations.

13. **Entire Agreement** This License Agreement, and any Support Agreement, constitutes the entire agreement between Collective Data and Company with regard to the Software Product and supersedes any and all prior agreements on this topic. This License Agreement shall not be modified except by a written agreement between authorized representatives of Collective Data and Company.

14. **Severability** If a court of competent jurisdiction determines that a provision of this License Agreement is unenforceable in any jurisdiction, then such provision shall be deemed modified to the minimum extent necessary to make it comply with the applicable law of such jurisdiction

15. **Governing Law** This License Agreement is governed by the laws of the State of Iowa and applicable U.S. federal law and the state and federal courts located in Cedar Rapids, Iowa, USA shall have exclusive jurisdiction and venue over any claim arising from this License Agreement.

Collective Data

Company:

By:

By:

Name:

Name:

Position:

Position:

Date:

Date:

Exhibit A

License Fee: _____

Number of Users covered by the License: _____

Number of Vehicles covered by the License: _____

License Period: _____

**COLLECTIVE DATA
SUPPORT AGREEMENT**

Agreement

This Support Agreement is between Company, as defined below, and Collective Data Incorporated (Collective Data), incorporated in the state of Iowa having a place of business at 230 2nd St. SE Ste. 414, Cedar Rapids, IA 52401.

1. Definitions.

1.1 “Application Server” means the portion of the Software Product that contains the database used in the Software Product.

1.2 “Client Application” means the portion of the Software Product that contains the interface used by the User to interact with the Application Server.

1.3 “Company” means the company, entity or individual identified in the License Agreement for the Software Product.

1.4 “Company Modifications” means all modification of the Software Program initiated, developed and implemented by the Company or Company’s agents using editors, API tools or development tools, whether provided by Collective Data or a third party.

1.5 “License Fee” means the amount of money listed in Exhibit A of the License Agreement, as increased by the cost of any Modifications performed during the previous License Period.

1.6 “License Period” means the time period listed in Exhibit A of the License Agreement.

1.7 “Modification” shall mean those changes, requested by the Company and implemented by Collective Data, that affect layout, functionality or other aspects of the Software Product. Modifications include but are not limited to, adding modules, fields, or reports; eliminating or adding sections; or changing the program layout. Modifications also include ongoing or periodic importations of data into the Software Product performed by Collective Data and changes in the Software Product needed to accommodate changes in the operating system of Company computers before the release of an Upgrade.

1.8 “Software Product” means both the Application Server and Client Application and includes the computer software and associated media, printed materials, and “on-line” or electronic documentation, including without limitation any and all executable files, add-ons, tutorials, and help files, and excludes all files containing source code.

1.9 “Support” means actions necessary to resolve any Technical Issue that affects any Supported Product.

1.10 “Supported Product” means the current version of the Software Product for which the Company has a Support Agreement with Collective Data.

1.11 “Support Agreement” means this agreement between Collective Data and Company related to ongoing support and maintenance to be provided by Collective Data.

1.12 “Technical Issue” means a problem with a Supported Product that affects a major functionality of the Supported Product and includes functions not performing to specifications, corrupt data, errors appearing within a Supported Product, or missing data on reports generated by the Supported Product.

1.13 “Training” means the provision of educational services relating to the Supported Product.

1.14 “User” means an employee of Company who Uses the Software Product. Other agents or contractors of Company are excluded from the definition of User. See Exhibit A for the number of licensed Users.

1.15 “Updates” means all modifications to the Software Product such as bug fixes provided by Collective Data at its discretion and represented by a change in the version number to the right of the right most decimal point. Updates do not include new modules or new software products.

1.16 “Upgrades” means major version changes of the Software Product and represented by a change in the version number to the left of the right most decimal point. Upgrades do not include new modules or new software products.

2. **Services Provided by Collective Data.**

2.1 **Training.** After the effective date of this Agreement or for any renewal, the Company shall be granted web-based training to be used at its discretion and subject to the availability of Collective Data training resources.

2.1.1 For License Agreements with 1-9 Users (as set in Exhibit A of the License Agreement), Company may use up to two (2) hours of web-based training. An unlimited number of people may participate in the web-based training.

2.1.2 For License Agreement with 10 or more Users (as set in Exhibit A of the License Agreement), Company may use up to four (4) hours of web-based training. An unlimited number of people may participate in the web-based training.

2.1.3 The training must be used during the current Term of the Support Agreement and shall not carry over into a subsequent Term.

2.2 **Modification.** Company may request a Modification at any time. Any Modification carried out by Collective Data is covered under the Support Agreement in place at the time the Modification is implemented. The Company is responsible for any cost of the requested Modification as determined by the then-current Collective Data pricing schedule. The Company understands that Modifications will increase the License Fee and also increase the cost of the Support Agreement Fee.

2.3 **Support.**

2.3.1 Company may make unlimited Support requests regarding questions and problems during the Term of this Support Agreement. Collective Data may also make periodic follow-up calls to ensure there are no outstanding Technical Issues.

2.3.2 Collective Data will thoroughly investigate all problems reported by Company. If the problem is a Technical Issue with the Supported Product, Collective Data will make commercially reasonable effort to correct the Technical Issue and Collective Data will provide: 1) a solution; 2) confirmation that the Software Products works per design specifications; or 3) confirmation that the problem will not be fixed.

2.3.3 Collective Data shall provide Support via telephone, email and fax for questions and problems during regular business hours (9:00 am - 5:00 pm CST) Monday through Friday except holidays. Collective Data support staff may provide Support outside of regular business hours at its discretion or as otherwise agreed to by the Company. Collective Data shall not be required to provide in-person support and shall use remote diagnosis tools to deliver support. To receive Support, Company shall authorize Collective Data’s use of remote diagnosis tools and access to Company’s computers and networks.

2.3.4 Collective Data shall not be required to provide Support regarding hardware installation, support or maintenance, unless such hardware has been purchased from Collective Data and is still within the manufacturer’s warranty period. If Company so requests, Collective Data may diagnose a hardware problem to the extent of its capability. Hardware support will be charged per call at the then-current Collective Data pricing schedule.

2.3.5 Collective Data has no obligation to support 1) a Software Product that has a Company Modification or has been altered by a third party; 2) any problem that is not a Technical Issue; 3) third-

party software or 4) backup procedures. Collective Data has no obligation to support or maintain interconnectivity with third party software, except as otherwise agreed.

2.3.6 Support requests will be prioritized by severity and handled in the order of most severe to least severe, with Technical issues ahead of other problems and questions. Priority is assigned in descending severity: the Software Product unavailable for processing; a portion of the Software Product is unavailable; operational questions that are holding up processing; operational questions that do not interfere with normal processing; enhancement suggestions/requests and requests for custom applications.

2.4 Updates and Upgrades.

2.4.1 All Updates and Upgrades, once installed, become part of the Supported Product.

2.4.2 Updates shall be provided as part of the Basic and Premium Support Agreement Fees. Company shall purchase Upgrades unless provided as part of the Premium Support Agreement Fee.

2.4.3 Updates and Upgrades shall be electronically downloadable from Collective Data. In order to receive any Updates or Upgrades, Company must have an Internet connection and Company must grant Collective Data access to Company's computers and networks to insure proper installation of Updates and Upgrades.

2.4.4 Updates to the Application Server shall be automatically installed by Collective Data to insure continued operation of the Application Server. Updates to the Client Application shall not be automatically installed unless Company chooses automatic installation. If Company does not choose automatic installation of Updates to the Client Application, then Company shall be solely responsible for the operation of the Software Product. Collective Data has no obligation to provide Support until the recent Update to the Client Application has been installed.

2.4.5 Upgrades will not be automatically installed because they may require operating system changes, data migration, additional training, and/or re-implementation of any user configurations. If Company purchases an Upgrade, the parties shall coordinate any needed updating of operating systems, data migration, training, and/or re-implementation of the Software Product.

2.4.6 All Upgrades will be scheduled by Collective Data at its reasonable discretion.

2.4.7 An Update or Upgrade does not grant Company additional Training beyond what is provided in Section 2.1.

3. Responsibilities of the Company.

3.1 The Company shall designate one (1) primary contact and one (1) backup contact who will interact with the Collective Data. Collective Data need not respond to or interact with any Company employee or agent except the primary and backup contacts. The primary and backup contacts shall have sufficient technical skill and knowledge of Company's computer systems and the Software Product to be able to assist Collective Data in resolving Technical Issues. Failure of Company to designate a primary or backup contact with sufficient technical skill and knowledge may result in additional fees and will reduce the effectiveness of the Support provided.

3.2 When reporting a Technical Issue, Company shall provide as accurate and complete description as possible including 1) details of what menu item or module was being accessed, 2) what Company was attempting to do, 3) the exact error message text as well as any other pertinent details. Company shall assist in Technical Issue resolution by providing copies of reports and/or files deemed necessary by Collective Data, via email or uploading files to Collective Data. All materials provided by Company during resolution of Technical Issues shall be considered confidential by Collective Data.

3.3 At all times, Company shall maintain daily backups of current data files and as recommended by Collective Data. Company shall also insure the secured storage of any media containing Software Product provided by Collective Data.

4. **Support for Company Modification.** Collective Data will provide reasonable support on editors, API tools and development tools provided by Collective Data. Collective Data will provide additional support in installing these Company Modifications. Collective Data shall not be required to support third party editors, API tools or development tools nor shall Collective Data be required to support Company Modifications utilizing third party editors, API tools or development tools. Company may choose to pay Collective Data on an hourly basis to support such Company Modifications.

5. **Term.** This Support Agreement shall be coterminous with the License Period.

6. **Support Agreement Fee.**

6.1 After the initial License Period, Company shall pay to Collective Data:

6.1.1 a Basic Support Agreement Fee equal to 15% of the License Fee; or

6.1.2 a Premium Support Agreement Fee equal to 25% of the License Fee. Company is entitled to one free Upgrade for every two Premium Support Agreement Fees paid by the Customer.

6.2 Payments shall be made at the beginning of each License Period after the initial License Period.

7. **Remaining Terms.** Terms of the License Agreement that do not contradict terms in this Agreement are incorporated by reference into this Agreement.

Collective Data

Company:

By:

By:

Name:

Name:

Position:

Position:

Date:

Date:

Company ID Number: 330080

Information Required for the E-Verify Program

Information relating to your Company:

Company Name: Collective Data

Company Facility Address: 308 Third Street SE STE 200

Cedar Rapids, IA 52401

Company Alternate
Address:

County or Parish: LINN

Employer Identification

Number: 391889090

North American Industry
Classification Systems

Code: 511

Parent Company: _____

Number of Employees: 10 to 19

Number of Sites Verified

for: 1

Are you verifying for more than 1 site? If yes, please provide the number of sites verified for in each State:

- IOWA 1 site(s)

Company ID Number: 330080

To be accepted as a participant in E-Verify, you should only sign the Employer's Section of the signature page. If you have any questions, contact E-Verify at 888-464-4218.

Employer Collective Data

Bill W Wessels

Name (Please Type or Print)

Title

Electronically Signed

Signature

05/24/2010

Date

Department of Homeland Security – Verification Division

USCIS Verification Division

Name (Please Type or Print)

Title

Electronically Signed

Signature

05/24/2010

Date

CERTIFICATION OF INDIVIDUAL BIDDER

Pursuant to Section 208.009 RSMo, any person applying for or receiving any grant, contract, loan, retirement, welfare, health benefit, post secondary education, scholarship, disability benefit, housing benefit or food assistance who is over 18 must verify their lawful presence in the United States. Please indicate compliance below. Note: A parent or guardian applying for a public benefit on behalf of a child who is citizen or permanent resident need not comply.

- 1. I have provided a copy of documents showing citizenship or lawful presence in the United States. (Such proof may be a Missouri driver's license, U.S. passport, birth certificate, or immigration documents). Note: If the applicant is an alien, verification of lawful presence must occur prior to receiving a public benefit.

- 2. I do not have the above documents, but provide an affidavit (copy attached) which may allow for temporary 90 day qualification.

- 3. I have provided a completed application for a birth certificate pending in the State of _____. Qualification shall terminate upon receipt of the birth certificate or determination that a birth certificate does not exist because I am not a United States citizen.

Applicant

Date

Printed Name

N/A

AFFIDAVIT
(Only Required for Certification of Individual Bidder (Option #2))

State of Missouri)
)SS.
County of _____)

I, the undersigned, being at least eighteen years of age, swear upon my oath that I am either a United States citizen or am classified by the United States government as being lawfully admitted for permanent residence.

Date

Signature

Social Security Number
or Other Federal I.D. Number

Printed Name

On the date above written _____ appeared before me and swore that the facts contained in the foregoing affidavit are true according to his/her best knowledge, information and belief.

Notary Public

My Commission Expires:

N/A

COUNTY OF BOONE - MISSOURI



REQUEST FOR PROPOSAL FOR FLEET MAINTENANCE SOFTWARE

RFP #33-03SEP13
Release Date: August 2, 2013

Submittal Deadline:
September 3, 2013
not later than 10:30 a.m. Central Time
Location: Boone County Purchasing
613 E. Ash Street, Room 109
Columbia, MO 65201

Boone County Purchasing
613 E. Ash Street, Room 109
Columbia, Missouri 65201

Amy Robbins, Senior Buyer
Phone: (573) 886-4392 Fax: (573) 886-4390
E-mail: arobbins@boonecountymo.org



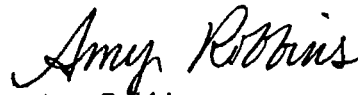
NOTICE OF REQUEST FOR PROPOSAL

Boone County is accepting Request for Proposals for the following:

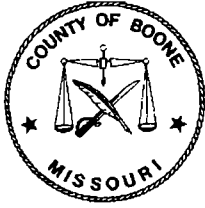
PROPOSAL #: 33-03SEP13 – Fleet Maintenance Software

Sealed proposals will be accepted until **10:30 a.m. on Tuesday, September 3, 2013** in the Boone County Purchasing Office, Room 109, 613 E. Ash Street, Columbia, MO 65201.

Request for Proposals are available in the Purchasing Office and requests for copies may be made by phone (573) 886-4392; fax (573) 886-4390 or e-mail: arobbins@boonecountymo.org or can be obtained on our web page: <http://www.showmeboone.com>.


Amy Robbins
Senior Buyer

Insertion: Tuesday, August 6, 2012
COLUMBIA MISSOURIAN



1. INSTRUCTIONS AND GENERAL CONDITIONS

1.1. **Delivery of Proposals:** Sealed proposals, subject to Instructions and General Conditions and any special conditions set forth herein, will be received at the Boone County Purchasing office until the proposal closing date and time indicated herein for furnishing the County with services as detailed in the following request for proposal.

- a) **Proposal Closing:** All proposals shall be **delivered before 10:30 A.M., C.S.T., on Tuesday, September 3, 2013** to:

Boone County Purchasing Department
Amy Robbins, Senior Buyer
613 E. Ash Street, Room 109
Columbia, Missouri 65201

- b) The County will not accept any proposals received after 10:30 AM. and will return such late proposals to the Offeror.
- c) Offerors must submit one **(1) original, and five (5) copies** of the proposal (total of six). Proposals will be opened publicly but only names of Offerors will be read aloud.
- d) Proposals must be submitted in a sealed envelope identified with the proposal number and date of closing. List the proposal number on the outside of the box or envelope and note "Response to Request for Proposal enclosed."
- e) If you do not care to submit a proposal, please return the *No Bid Response Form* and note your reason. No fax or electronic transmitted proposals will be accepted, however, the *No Bid Response Form* may be returned by fax.
- f) If you have obtained this proposal document from our Web Page or from a source other than the Boone County Purchasing Department, please check with our office prior to submitting your proposal to ensure that you have a complete package. The Purchasing Department cannot be responsible for providing addenda if we do not have you on our Vendor list for this proposal.



2. INTRODUCTION AND GENERAL INFORMATION

2.1. Introduction:

- 2.1.1. This document constitutes a request for sealed proposals for the furnishing, delivery, installation and training of **Fleet Maintenance Software**, as set forth herein.
- 2.1.2. Organization – This document, referred to as a Request for Proposal (RFP), is divided into the following parts:
- 1) Instructions and General Conditions
 - 2) Introduction and General Information
 - 3) Scope of Services
 - 4) Contract Terms and Conditions for Awarded Contractor
 - 5) Proposal Submission Information
 - 6) Response/Pricing Page
 - 7) Standard Terms and Conditions
 - 8) Instructions for Compliance with House Bill 1549
 - a. Work Authorization Certification
 - b. Certification of Individual Bidder
 - c. Individual Affidavit
 - 9) Debarment Certification
 - 10) Prior Experience
 - 11) "No Bid" Response Form

2.2. Guideline for Written Questions:

- 2.2.1 **All questions** regarding this Request for Proposal should be submitted in writing no later than **5:00 p.m., August 27, 2013**. All questions must be mailed, faxed or e-mailed to the attention of Amy Robbins, Senior Buyer. All such questions will be answered in writing, and such answers will be provided to all parties having obtained a Request for Proposal packet by the County by posting the addendum on the County Web site at www.showmeboone.com (Select Purchasing, then Current Bid Opportunities). Submit questions to:

- a. Amy Robbins
Senior Buyer
613 E. Ash Street, Room 109
Columbia, Missouri 65201
Phone: (573) 886-4392 Fax: (573) 886-4390
E-mail: arobbins@boonecountymo.org

- 2.2.2 In the event that it becomes necessary to revise any part of this RFP, written addenda will be issued. Any addendum to this RFP is valid only if in writing and issued by the Boone County Purchasing Department. Verbal conversations or agreements with any officer, agent, or employee of the County which modify any terms or obligations of this RFP are invalid.

2.3. Insurance Requirements: The vendor receiving a contract award shall provide an Insurance Certificate to the Purchasing Department at time of contract execution with the following levels of insurance.

- 2.3.1. The Contractor shall not commence work under this contract until they have obtained all insurance required under this paragraph and such insurance has been approved by the County, nor shall the Contractor allow any subcontractor to commence work on their subcontract until all similar insurance required of subcontractor has been so obtained and approved. All policies shall be in amounts, form and companies satisfactory to the County which must carry an A-6 or better rating as listed in the A.M. Best or equivalent rating guide. Insurance limits indicated below may be lowered at the discretion of the County.
- 2.3.2. **Compensation Insurance** - The Contractor shall take out and maintain during the life of this contract, **Employee's Liability and Worker's Compensation Insurance** for all of their employees employed at the site of work, and in case any work is sublet, the Contractor shall require the subcontractor similarly to provide Worker's Compensation Insurance for all of the latter's employees unless such employees are covered by the protection afforded by the Contractor. Worker's Compensation coverage shall meet Missouri statutory limits. Employers' Liability limits shall be \$1,000,000.00 each employee, \$1,000,000.00 each accident, and \$1,000,000.00 policy limit. In case any class of employees engaged in hazardous work under this Contract at the site of the work is not protected under the Worker's Compensation Statute, the Contractor shall provide and shall cause each subcontractor to provide Employers' Liability Insurance for the protection of their employees not otherwise protected.
- 2.3.3. **Comprehensive General Liability Insurance** - The Contractor shall take out and maintain during the life of this contract, such comprehensive general liability insurance as shall protect them and any subcontractor performing work covered by this contract, from claims for damages for personal injury including accidental death, as well as from claims for property damages, which may arise from operations under this contract, whether such operations be by themselves or for any subcontractor or by anyone directly or indirectly employed by them. The amounts of insurance shall be not less than \$2,000,000.00 combined single limit for any one occurrence covering both bodily injury and property damage, including accidental death. If the Contract involves any underground/digging operations, the general liability certificate shall include X, C, and U (Explosion, Collapse, and Underground) coverage. If providing Comprehensive General Liability Insurance, then the Proof of Coverage of Insurance shall also be included.
- 2.3.4. **COMMERCIAL Automobile Liability** - The Contractor shall maintain during the life of this contract, automobile liability insurance in the amount of not less than \$2,000,000.00 combined single limit for any one occurrence, covering both bodily injury, including accidental death, and property damage, to protect themselves from any and all claims arising from the use of the Contractor's own automobiles, teams and trucks; hired automobiles, teams and trucks; and both on and off the site of work.
- 2.3.5. **Proof of Carriage of Insurance** - The Contractor shall furnish the County with Certificate(s) of Insurance which name the County as additional insured in an amount as required in this contract, contain a description of the project or work to be performed, and requiring a thirty (30) day mandatory cancellation notice. In addition, such insurance shall be on occurrence basis and shall remain in effect until such time as the County has made final acceptance of the facility contracted.

2.4. Indemnity Agreement: To the fullest extent permitted by law, Contractor shall indemnify, hold harmless and defend the County, its directors, agents, and employees from and against all

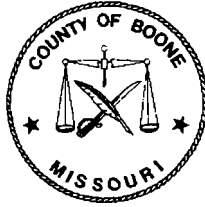
claims arising by reason of any act or failure to act, negligent or otherwise, of Contractor, (meaning anyone, including but not limited to consultants having a contract with Contractor or subcontractor for part of the services), of anyone directly or indirectly employed by Contractor, or of anyone for whose acts the Contractor may be liable, in connection with providing these services. This provision does not, however, require Contractor to indemnify, hold harmless, or defend the County of Boone from its own negligence.

2.5. Billing and Payment: All invoices must be submitted to **Boone County Public Works** as outlined in paragraph 2.6. Payment will be made within 30 days after receipt of a correct and valid invoice following completion and acceptance of project. Purchase Order or contract number should appear on invoice.

2.6. Designee: Boone County Public Works, 5551 Tom Bass Rd., Columbia, MO 65201

2.7. Proposed Solicitation/Award Schedule (these are approximate dates):

2.7.1.	August 2, 2013	Release of RFP
2.7.2.	August 6, 2013	Advertisement of RFP
2.7.3.	August 27, 2013, 5:00 p.m.	Deadline for submitting questions
2.7.4.	September 3, 2013, 10:30 a.m.	Proposal due date and time
2.7.5.	September 4 – September 30, 2013	RFP Evaluation
2.7.6.	October 15, 2013	Contract Award
2.7.7.	November 30, 2013	Data Migration to New System Complete
2.7.8.	December 15, 2013	Completion Date



3.0 SCOPE OF SERVICES

3.1. Project Description:

The County of Boone – Missouri, hereafter referred to as *the County*, hereby solicits formal written proposals from qualified offerors to provide **Fleet Maintenance Software** for the County.

3.2. Background:

3.2.1. The new Fleet Maintenance Software will be replacing Fleet Computing (JetFleet) which has been in place for over twenty years. There are 394 units in the current Fleet inventory totaling over \$12 million.

3.2.3. Additional information about the County of Boone – Missouri can be obtained from the following internet web site at: <http://www.showmeboone.com>

3.2.4. Although an attempt has been made to provide accurate and up-to-date information, the County of Boone – Missouri does not warrant or represent that the background information provided herein reflects all relationships or existing conditions related to this Request for Proposal.

3.3 Scope of Services:

3.3.1. The system must be a real-time application, thus updating all files as the transaction occurs, not in a batch mode. However, electronic fuel transfers will operate in a batch mode. The system must be fully integrated, thus no data will be entered separately into two different software modules.

3.3.2. All data from current system must be extracted and imported into the new Fleet Maintenance Software. The cost for such extraction and importation shall be noted on the corresponding line on the Pricing Page.

3.3.3. Preferred Platform for Software

3.3.3.1 Vendor must specify preferred server platform and hardware requirements within proposal response.

3.3.3.2 Must be compatible with and function within an MS Active Directory network environment

3.3.4 Software Licensing Requirements

3.3.4.1 At least two administrative seats and five service technicians. Vendor shall state whether software license is concurrent usage or per computer. Software license terms must be for the lifetime of the software.

3.3.5. System Features

- 3.3.5.1. **On-Line Help.** The software must have context sensitive help that can be easily accessed using a function key. This must include comprehensive documentation that includes reports, data entry and display screens.
- 3.3.5.2. **Print-it Feature.** The software must have the capability of viewing all reports on the screen, then choosing or not choosing to print the report. The user must be able to view the entire report by either condensing the size of the print on the screen or by using designated keystrokes to move up/down, right/left.
- 3.3.5.3. **User Security.** The software must have an optional security system by user ID and password. Each user ID has access to functions in the system they are given rights to.
- 3.3.5.4. **Management Security.** If the optional user security is turned off, there must be management security passwords protecting mechanic wage information, purge functions and system parameter options from general access.

3.3.6. System Parameters

- 3.3.6.1. The software must have a number of system parameters designed to allow the user to define certain features and to determine if a number of these features will be used. The following parameters should be included:
 - a. **Customer Billing.** Option allows customers to have their own labor, tires, and parts markups, and tax rates
 - b. **Work Order Reason Codes.** Option allows the user to track the reason a work order is opened; user definable up to 99 codes.
 - c. **Shop Codes on WO's.** Option allowing the user to assign shop numbers on a work order.
 - d. **Part Pick List.** Option compiles a list of parts needed for preventative maintenance and other repairs that will print with the work order.

3.3.7. Vehicle Inventory

- 3.3.7.1. At least an 8 Character Alphanumeric Vehicle Number
- 3.3.7.2. At least a 4 Character Alphanumeric Department Field
- 3.3.7.3. Yr., Make, Model Fields
- 3.3.7.4. Vehicle Size Classifications: L=Light , M=Medium, H=Heavy, T=Trailer, O=Other
- 3.3.7.5. Location – at least a 20 Digit Alphanumeric Field
- 3.3.7.6. Registration Number (Fixed Asset Number)
- 3.3.7.7. Serial Number
- 3.3.7.8. Main Odometer Unit Selection of: Miles, Hours, Units, Kilometers, or Gallons
- 3.3.7.9. Each vehicle can be assigned up to 4 alternate meters.

- 3.3.7.10. Purchase Date
- 3.3.7.11. In-Service Date
- 3.3.7.12. Engine Make
- 3.3.7.13. Engine Model
- 3.3.7.14. Transmission Make
- 3.3.7.15. Transmission Model
- 3.3.7.16. Tons
- 3.3.7.17. Front Axle
- 3.3.7.18. Wheel Size
- 3.3.7.19. Tire Size
- 3.3.7.20. Tire, ply, etc.
- 3.3.7.21. Unit GVW
- 3.3.7.22. Wheel Base
- 3.3.7.23. Alternator Make, Alternator Amps
- 3.3.7.24. Brake
- 3.3.7.25. Steering
- 3.3.7.26. Spec Body Make, Spec Body Model, Spec Equipment
- 3.3.7.27. Purchase Price, Current Value, Trade in Value
- 3.3.7.28. Licensing, Insurance, and Depreciation fixed cost fields
- 3.3.7.29. License Expiration – Period
- 3.3.7.30. System shall carry unlimited user defined designated fields for unit and class that also offer non access security read.
- 3.3.7.31. Oil Part Number and Quart Capacity
- 3.3.7.32. Transmission Fluid Part Number and Quart Capacity
- 3.3.7.33. Tire Count/Max
- 3.3.7.34. Service Notes: Minimum of 60 Characters to print on PM Due Report
- 3.3.7.35. Tank Capacity, Vehicle Average MPG

- 3.3.7.36. Highway Tax
- 3.3.7.37. PM scheduling for over 100 types of PM's specific to each vehicle
- 3.3.7.38. PM scheduling by time and/or miles, hours, kilometers, units, gallons and alternate meters
- 3.3.7.39. PM part kit identification number for each PM
- 3.3.7.40. The ability to include 1 PM or more within another (nesting).
- 3.3.7.41. State Inspection Scheduling
- 3.3.7.42. The ability to assign unlimited pieces of equipment to a vehicle. For example CB Radios, Wheel Chair Lifts, ect.
- 3.3.7.43. Unlimited notes attached to each vehicle
- 3.3.7.44. The ability to track fuel taxes on a vehicle
- 3.3.7.45. The ability to display the vehicle/equipment master record by vehicle number, VIN number, registration number or license plate number.
- 3.3.7.46. A vehicle's facility, department, number, class, or location can be changed at any time. All history must be transferred with the vehicle.
- 3.3.7.47. A vehicle's customer number may be changed at any time. All repair history must remain with the customer assigned at the time the repair is done.
- 3.3.7.48. Any vehicle master record can be copied to another so only information that is different will need to be entered. (Optional)
- 3.3.7.49. A vehicle warranty system must be available to track bumper-to-bumper warranties.
- 3.3.7.50. The vehicle warranty system must also track component warranties by VMRS code, for original equipment warranties, dealer extended warranties, or repairs done by outside vendors. Enter hours/miles and/or months of warranties.
- 3.3.7.51. The vehicle warranty system must integrate with the system's work order process by immediately flagging warranty repairs.
- 3.3.7.52. The system must have an odometer change routine that is used when an odometer breaks or rolls over. This routine allows the system to track the life miles of a vehicle even if the odometer reading is different.
- 3.3.7.53. The odometer change routine automatically adjusts and updates the preventative maintenance schedule for a vehicle.
- 3.3.7.54. Preventative maintenance due reports can sort on vehicle number, vehicle location, and vehicle department fields.

- 3.3.7.55. Preventative maintenance reports can be selected to print or view PM's due within a specified date range.
- 3.3.7.56. Preventative maintenance reports can be selected to print all PM levels due or a single PM level.
- 3.3.7.57. Preventative maintenance due reports can be selected on: past due, now due, due within the next "X" days, and/or next X miles, hours, or gallons.
- 3.3.7.58. The system can print and e-mail preventative maintenance notification cards.
- 3.3.7.59. PM completion is automatically posted through the Work Order Module and/or by a special posting routine.

3.3.8. Vehicle Cost Reports

- 3.3.8.1. Repair history reports are available that can be sorted by department or vehicle and by a range of repair codes and dates. It will print major repair categories and list detail repair data that includes the description, parts and labor costs, for each vehicle.
- 3.3.8.2. The repair history report will summarize parts and labor cost totals and percentages of expenditure for each major repair category. It will also print the cost per mile of each major repair code for the current period, year-to-date, or life-to-date of the vehicle.
- 3.3.8.3. Cost per mile/hour reports are available by dept., vehicle, or make/yr. Prints period, year-to-date, life-to-date figures. Prints cost per mile/hour for tires, maintenance, miles per quart of oil. Prints license, insurance, depreciation expenses and fixed cost per mile, miles/hours per gallon.
- 3.3.8.4. The cost per mile/hour reports produce totals for the range of vehicles specified and sub-totals for each department. (Optional)
- 3.3.8.5. **Total Cost Reports.** Sorts by department, and/or vehicle. Prints period, year-to-date, life-to-date figures. Prints miles driven, gallons of fuel consumed, oil usage, tire cost, labor hours and cost, outside repairs, total repair costs, total maintenance cost, breakdowns, and utilization. Can group costs by repair reason or type.
- 3.3.8.6. **Fleet Cost Reporting.** Calculates burdened hourly shop labor rate using data collected such as direct labor hours plus user-defined data of other costs.

3.3.9. Fuel Interface Module

- 3.3.9.1. **Fuel Entry.** Input miles/hours, gallons, date, state, days utilized, and cost of fuel if outside vendor. Automatically updates odometer readings and PM schedules.
- 3.3.9.2. **Electronic Fuel Interface.** Software shall accept data from an Electronic Fueling system and use this data to update associated files. Any fueling system is acceptable as long as data is compatible with Fuel Master fuel systems batch file.

3.3.10. Parts Inventory Module

- 3.3.10.1. Fully integrates with work orders.
- 3.3.10.2. At least a 15 character alpha-numeric part number.
- 3.3.10.3. Minimum of 5 vendors for each part with corresponding cross-reference numbers, manufacturer, and last price paid.
- 3.3.10.4. At least a 6 character alpha-numeric bin location.
- 3.3.10.5. Average price costing method with the ability to use LIFO or FIFO.
- 3.3.10.6. Ability to mark up average price by user-defined percentage for an individual part.
- 3.3.10.7. Ability to lock in part price charged to a vehicle regardless of the average price.
- 3.3.10.8. Ability to mark up non-inventory parts by a user-defined percentage.
- 3.3.10.9. Ability to flag a part as either a stocking or non-stocking part.
- 3.3.10.10. Ability to assign up to eight, four-character fits codes for each part. This allows the user to print a list of parts that fit on a vehicle type.
- 3.3.10.11. Up to 5 stocking locations per facility for 1 facility.
- 3.3.10.12. Tracks accumulated parts usage per period and year to date.
- 3.3.10.13. The option of user-defined reorder points and quantities or system-adjusted reorder points and quantities on a part-by-part basis.
- 3.3.10.14. System displays the current on-order quantity
- 3.3.10.15. Back order quantity.
- 3.3.10.16. Last invoice number and date.
- 3.3.10.17. Part types: part, oil, tire, fuel, antifreeze, ntr
- 3.3.10.18. Tracks part warranties by miles/hours and/or months.
- 3.3.10.19. Tracks component failure statistics by miles/hours and/or months.
- 3.3.10.20. Part renumber utility.
- 3.3.10.21. Part kits: up to 20 parts with associated quantities.
- 3.3.10.22. Ability to take inventory using barcoding and a handheld data collection device. Data collected can be downloaded into parts inventory, compared to quantities-on-hand and adjusted simultaneously.
- 3.3.10.23. Ability to adjust parts inventory or back out a transaction.
- 3.3.10.24. Ability to print regular or barcode tags for parts or bins.

3.3.10.25. Ability to read vendor barcodes.

3.3.11. Part Inventory Lists

3.3.11.1. By Part Number.

3.3.11.2. By Cross Reference Part Number.

3.3.11.3. By Vendor

3.3.11.4. Non-Stock Parts.

3.3.11.5. By Bin Location.

3.3.11.6. By Part Name.

3.3.11.7. Part-Kit List.

3.3.11.8. Distribution List: For inventory purposes; Prints by bin location, all parts or just stocking parts, print with quantity-on-hand or with blank quantities, with or without barcodes.

3.3.12. Parts Management Reports

3.3.12.1. Low use report prints parts on file with 1-13 consecutive periods of zero use.

3.3.12.2. General use report by vendor or part number. Report lists quantities used per part per period.

3.3.12.3. Inventory Balance Report.

3.3.12.4. Parts adjustment report.

3.3.12.5. Parts usage by work order. This report lists for a single part or all parts, the repair order, vehicle, part number, repair code, transaction date, quantity, price and total charged to a work order.

3.3.12.6. Part failure analysis. Prints where in the life cycle each trackable/warranty part fails by miles and/or months, for the period, year, and life-to-date.

3.3.12.7. Warranty reporting by part or vehicle number.

3.3.13. Vendor Information

3.3.13.1. Vendor Number (minimum 6 numeric digits).

3.3.13.2. Vendor Abbreviation (minimum 6 alpha).

3.3.13.3. Name, Address, City, State, Zip.

3.3.13.4. Vendor Phone Number, Contact.

3.3.13.5. Last Purchase Date.

3.3.13.6. Year-to-date purchases.

3.3.14. Work Orders

- 3.3.14.1. The software must use VMRS format to specify labor codes. The software has the capability of defining difficulty factors that allow the user to designate up to 5 different time estimates for a single labor code depending on how difficult a task is on a specific vehicle or vehicle class.
- 3.3.14.2. Capability of processing work orders in both real time or batch mode.
- 3.3.14.3. Use of VMRS Repair Codes, 3 digit, 6 digit, or 9 digit level.
- 3.3.14.4. Easy access to vehicle master file from work order processing.
- 3.3.14.5. Job related repair history displays when building or processing a work order.
- 3.3.14.6. Access to all repair history on file when building or processing a work order.
- 3.3.14.7. PM's due will display when building a work order.
- 3.3.14.8. VMRS, vehicle, customer, vendor, mechanics, parts look-up help screens throughout.
- 3.3.14.9. Tracks outside repairs including vendor, purchase order number, outside parts, and outside labor.
- 3.3.14.10. Ability to create template work orders to use over and over again with a unlimited checklist.
- 3.3.14.11. Optional repair order priority codes – minimum 9 user defined.
- 3.3.14.12. Optional work order reason codes – minimum 99 user defined.
- 3.3.14.13. Optional work accomplished codes – minimum 20 user defined.
- 3.3.14.14. Optional work order line cause codes – minimum 15 user defined.
- 3.3.14.15. Work description codes – minimum 10 user defined.
- 3.3.14.16. Ability to edit codes once entered.
- 3.3.14.17. Ability to change work order post date.
- 3.3.14.18. Up to 99 repair lines per work order.
- 3.3.14.19. Up to 5 lines (300 characters) notes per each work order line.
- 3.3.14.20. Up to 3 lines (180 characters) master notes when closing work order.
- 3.3.14.21. Ability to add part record on-the-fly.
- 3.3.14.22. Fully integrated parts module, automatic depletion of inventory when part is posted.

- 3.3.14.23. Parts and labor warranty credits can be entered.
- 3.3.14.24. User has the option of accepting the current odometer reading of a vehicle when creating a work order or requiring entry of an odometer reading.
- 3.3.14.25. User has option of system sequentially numbering work orders or assigning their own.
- 3.3.14.26. User has the option to allow the override of the mechanic's labor rate, part cost or tire cost during work order post routine.
- 3.3.14.27. Work order post routine updates vehicle history, cost reports, mechanic productivity, and repair order transaction files.
- 3.3.14.28. Open work order line report is available by work order priority code or create date. This report prints each open work order line, when it was last updated, the posted parts amount, labor amount and labor hours.
- 3.3.14.29. A work order scheduling report is available by shop code, open work orders (yes or no). This report sorts by priority code, and prints the work order number, vehicle, customer, create date, number of jobs scheduled, number or jobs complete, and scheduled hours.
- 3.3.14.30. The system can print, sort, and total work order by number, date, or customer, and select open, closed, or both.

3.3.15. Paperless Shop Module (Optional)

- 3.3.15.1. Uses computer workstations in a real-time mode on the shop floor.
- 3.3.15.2. Mechanics clock on and off assigned jobs and indirect jobs such as fueling vehicles, or cleaning shop floor, at the mechanic workstation.
- 3.3.15.3. An unlimited number of jobs can be assigned to each mechanic.
- 3.3.15.4. The system calculates the actual time spent on a job, tracking the mechanic's entire work day.
- 3.3.15.5. The mechanic can clock off a job prior to its completion, start another job, then clock back on a previous job. The system will accumulate the total time spent.
- 3.3.15.6. Mechanics and/or parts personnel can be given the rights to post parts used on a job, including tires.
- 3.3.15.7. Mechanics and/or parts personnel can use a barcode reader to post parts on a work order in paperless shop.
- 3.3.15.8. Management personnel can add, delete, and reprioritize jobs assigned to a mechanic throughout the workday
- 3.3.15.9. The system is tracking the actual time spent on the job versus the estimated time. The program is keeping all records up-to-date and accurate in a real-time mode.

3.3.16. Tire Module – Software shall supply a tire record file for each tire owned or leased by the user, indicating:

- 3.3.16.1. Tire number.
- 3.3.16.2. Vehicle mounted on.
- 3.3.16.3. Tire position
- 3.3.16.4. Number of caps.
- 3.3.16.5. Capper number.
- 3.3.16.6. Tire size.
- 3.3.16.7. Tire type.
- 3.3.16.8. Total cost.
- 3.3.16.9. Mounted odometer.
- 3.3.16.10. Tread type.
- 3.3.16.11. Ply rating.
- 3.3.16.12. Current vehicle odometer.

3.3.17. Tire Reporting (Optional)

- 3.3.17.1. Software provides a report to project the number of tires due to fail over a specified number of periods based on the tire's mileage and wear characteristics.
- 3.3.17.2. Software provides manufacturer and cappers cost and performance reports.
- 3.3.17.3. Software provides tire life transaction reports by all transactions or a particular type of transaction such as send capper.
- 3.3.17.4. Software provides inventory lists by tire or vehicle.

3.3.18. Image Viewer (Optional) – The software may have the ability to attach and view from within the software any text or image file. The image viewer can be used to attach files to the following areas of the software:

Parts: MSDS sheets, schematics, warranties

Vehicles: Photo, accident damage picture, accident report, original specs

Vendors: Warranties, return policies, location, product lines, pricing structure

Facilities: Photo, map/directions, shop and building layout

Customers: Contracts, payment history, capitalization approvals

Departments: Building layouts and schematics, correspondence, contracts

Purchase Orders: Signed receipts, invoices, credit slips

Work Orders: Damage photos and reports, modification approvals, old part pictures

Estimate Work Orders: Photos, signed agreement, additional notes

Tools: Photo, schematics, warranty

Tires: Warranty, photo

Employees: Application, certificates, drivers license, insurance

Mounted Equipment: Photo installed, schematics, warranty

Fuel Pumps & Tanks: UST information, pressure tests, certifications, schematics

Motor Pool Reservations: Accident damages, photos, signed contracts, drivers license, insurance

3.3.19. Bar Coding

3.3.19.1. The software must accept bar coded entry for unit related entries, parts, inventory, PO parts received, and allow for bin location.

3.3.19.2. Software supports label printing when receiving parts.

3.3.19.3. Parts can be scanned to WO

3.3.19.4. When receiving a part, the system auto-creates an audit trail to support accurate inventory analysis and work order posting.

3.3.19.5. Bar codes can be uniquely created for equipment and personnel identification.

3.3.20. Dashboard - Run separately from main system, software supports user dashboards that highlight realtime data for preventive maintenance stats, work order line entries, purchase orders, vehicle status, labor hour and other monitoring widgets.

3.3.21. Report Writing

3.3.21.1. Data can be sorted in any order based on any field or any combination of up to nine different fields.

3.3.21.2. Software supports and uses alternate index keys so many report orders can be used without sorting.

3.3.21.3. Based on index keys, file reads can be started and stopped at specific locations so that data from large files can be extracted very quickly.

Formatting

3.3.21.4. User can control every position on every line, so that reports can be tailored to the exact format requirement.

3.3.21.5. Reporting on subtotals and/or totals without detail is possible.

- 3.3.21.6. Subtotal and/or total information can be directed to one output device or method while detail is sent to another.
- 3.3.21.7. Nested subtotals are supported to nine levels all automatically.
- 3.3.21.8. Multiple records per line or multiple lines per record are supported.
- 3.3.21.9. Page lengths, headings, footers are supported.
- 3.3.21.10. Field editing can be defaulted or custom designed with edit masks (templates).
- 3.3.21.11. System constants (date, time, page and records counters, etc.) are available for inclusion in reports.

Output

- 3.3.21.12. Output can be directed to printers or screens in the same report.
- 3.3.21.13. Output can be directed to character separated files for exporting to other packages.
- 3.3.21.14. Data can be sent to an interim file for later, subsequent reporting.
- 3.3.21.15. Output modes can be changed on the fly so development work can be done at a terminal and final output can be directed to any printer.
- 3.3.21.16. All screen output is captured so final reports can be scrolled backwards, forwards and side to side without limits.
- 3.3.21.17. Saved reports can be run in the background on multi-user computers or run sequentially unattended in a single-user environment.

3.4. Training

At a minimum, the vendor must supply user documentation, on-site training and/or web-based training, and technical support as required by the County. The vendor must also supply on-line and toll free telephone help for its proposed solution.

Each bidder must provide the names of the employees who will be directly involved in this project and their experience in providing and installing fleet management system software.

Provide a detailed description of the training proposed. Indicate if training can be accomplished on site or if personnel will need to travel to a training site. The following additional information is to be provided in regards to training:

- 3.4.1. References for Training
- 3.4.2. Training Agendas, Descriptions, etc.
- 3.4.3. Samples of Training Materials
- 3.4.4. Statement Concerning Minimum/Maximum Class Size
- 3.4.5. Equipment Provided/Needed for Training
- 3.4.6. Number of Days/Hours of Training

3.5. Warranty / Maintenance - Any warranty provided by the vendor must be clearly stated. This includes on-site or web based software installation and training, telephone support, and software upgrades. The vendor must be capable of providing on-going technical support to the County. A summary of the technical support offered and any and all fees for this technical support after the initial warranty period must be listed as an option.

3.6. Project Timeline/Milestones:

3.6.1 Within forty-five (45) days after contract award, the County must be able to test and import current data into the software package.



4.0. **CONTRACT TERMS AND CONDITIONS FOR AWARDED CONTRACTOR**

- 4.1. **Contract Period:** The initial term of the resulting contract agreement for the proposed software from this Request for Proposal will begin at the time of contract award and end upon project completion. If maintenance is offered on any of the software that is outside of the warranty, please describe in detail. **The maintenance** portion of the Contract Agreement should be from equipment installation through **December 31, 2014 in order to be with the County's fiscal year.** The maintenance agreement may be renewed by the Purchasing Director for up to an **additional five (5) one-year periods, beginning on January 1.** Maintenance prices are subject to adjustment thereafter per pricing proposed on Response Page, effective on the renewal date, and must remain firm through the end of the renewal period.
- 4.2. **Contract Documents:** The successful Offeror shall be obligated to enter into a written contract with the County within 30 days of award on contract forms provided by the County. If Offeror desires to contract under their own written agreement, any such proposed agreement shall be submitted in blank with their response. County reserves the right to modify any proposed form agreement or withdraw its award to a successful Offeror if any proposed agreement contains terms and conditions inconsistent with its request or are unacceptable to county legal counsel.
- 4.3. **Provisions for Termination:** The contract may be terminated by the County for any of the following reasons or under any of the following circumstances.
- 4.3.1. Due to a material breach of any term or condition of this agreement.
- 4.3.2. If in the opinion of Boone County, delivery of products / services are delayed or products/services delivered are not in conformity with the contract documents.
- 4.3.3. If appropriations are not made available and budgeted for in any calendar year.
- 4.3.4. Boone County reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor **MUST** notify the County.
- 4.4. In case of any default by the Contractor, the County may procure the product or service from other sources and hold the Contractor responsible for any damages incurred including, but not limited to, excess cost or handling charge. The County shall have the right to remove any Contractor who defaults on any contract with the County from all Bidders' lists.
- 4.5. The successful Contractor is prohibited from assigning, transferring, conveying, subletting, or otherwise disposing of this agreement or its rights, title or interest therein, or its power to execute such agreement to any other person, company or corporation without the prior consent and approval in writing by the County.
- 4.6. Contractor must clearly state in writing any restrictions or deviations from these specifications. In the absence of such statement, the County will assume that all items/services offered are in strict compliance with the technical and financial requirements, contract terms and conditions as

described in these specifications. The proposal of the Contractor will be included as part of the final contract.

- 4.7. Award will be made by written notification from the Purchasing Department. This written notice shall be deemed to result in a binding contract which shall be governed by the laws of the State of Missouri as adopted and in force on the date of the agreement.
- 4.8. Contractor agrees to furnish service and to perform the delivery of service within the stated completion schedule, and in strict compliance with requirements stated in the RFP Document.
- 4.9. Contractor proposes and agrees to accept, as full compensation for furnished service, the price submitted in response to the RFP document or subsequent Best and Final Offer(s). All related costs associated with providing the services specified shall be considered by both County and Contractor to be included within the quoted price. The County shall not pay, nor be liable for, any additional cost including, but not limited to taxes, insurance, interest, penalties, termination payments, attorney fees, liquidation damages, etc.
- 4.10. Contractor agrees that no modification of any provision contained in the contract shall be made, or construed to be made, unless such modification is mutually agreed to by both parties and incorporated in a written amendment to the contract approved by the Purchasing Director.
- 4.11. Attached Standard Terms and Conditions for Contracts shall apply to the contract award.
- 4.12. Patents: The Contractor shall protect the County against suits for patent infringement on material, equipment, and methods used.
- 4.13. The County reserves the right to award to one or multiple respondents. In addition, the resulting contract from this RFP will be considered "Non-Exclusive". The County reserves the right to obtain service and/or product from other suppliers.



5. PROPOSAL SUBMISSION INFORMATION

5.1. RESPONSE TO PROPOSAL

5.1.1. Submission of Proposals:

5.1.1.1. When submitting a proposal, the Offeror should include the **original and five (5) additional copies (total of 6.)**

a. The Offeror shall submit the proposal to:

Boone County Purchasing Department
Attn: Amy Robbins, Senior Buyer
613 E. Ash Street, Room 109
Columbia, MO 65201

b. The proposal response must be delivered no later than **10:30 a.m. on Friday, September 3, 2013**. Proposals will not be accepted after this date and time.

5.1.1.2. To facilitate the evaluation process, the Offeror is encouraged to organize their proposal into distinctive sections that correspond with the individual evaluation categories described herein.

a. Each distinctive section should be titled with each individual evaluation category and all material related to that category should be included therein.

b. The signed response page from the original RFP and all signed amendments should be placed at the beginning of the proposal.

c. The Proposal must, at a minimum, address all mandatory and desired services, equipment, materials, etc. Responses will fully describe how the service will be performed and what hardware/software (if any) is required at the County to access the service.

5.1.1.3. The Offeror is cautioned that it is the Offeror's sole responsibility to submit information related to the evaluation categories, and that the County is under no obligation to solicit such information if it is not included with the proposal. The Offeror's failure to submit such information may cause an adverse impact on the evaluation of the proposal. Any Offeror whose responses deviate from the outlined specifications may automatically be disqualified.

5.1.1.4. Offeror's Contacts: Offerors and their agents (including subcontractors, employees, consultants, or anyone else acting on their behalf) must direct all of their questions or comments regarding the RFP, the evaluation, etc. to the buyer of record indicated on the first page of this RFP. Offerors and their agents may not contact any County employee other than the buyer of record regarding any of these matters during the solicitation and evaluation process. Inappropriate contacts are grounds for suspension and/or exclusion from specific procurements. Offerors and their agents who have questions regarding this matter should contact the buyer of record.

5.1.2. Competitive Negotiation of Proposals: The Offeror is advised that under the provisions of this Request for Proposal, the County reserves the right to conduct negotiations of the proposals received or to award a contract without negotiations. If such negotiations are conducted, the following conditions shall apply:

- 5.1.2.1. Negotiations may be conducted in person, in writing, or by telephone.
- 5.1.2.2. Negotiations will only be conducted with potentially acceptable proposals. The County reserves the right to limit negotiations to those proposals, which received the highest rankings during the initial evaluation phase.
- 5.1.2.3. Terms, conditions, prices, methodology, or other features of the Offeror's proposal may be subject to negotiation and subsequent revision. As part of the negotiations, the Offeror may be required to submit supporting financial, pricing and other data in order to allow a detailed evaluation of the feasibility, reasonableness, and acceptability of the proposal.
- 5.1.2.4. The mandatory requirements of the Request for Proposal shall not be negotiable and shall remain unchanged unless the County determines that a change in such requirements is in the best interest of the entities.

5.1.3. Evaluation and Award Process:

5.1.3.1. After determining a responsible Offeror and a responsive proposal through the determination that the proposal satisfies the mandatory requirements stated in the Request for Proposal, the evaluator(s) shall use both objective analysis and subjective judgment in conducting a comparative assessment of the proposal in accordance with the evaluation criteria stated below:

- a. **Method of Performance**
- b. **Experience/Expertise**
- c. **Cost**

5.1.3.2. After an initial evaluation process, a question and answer interview may be conducted with the Offeror, if deemed necessary by the County. In addition, the Offeror may be asked to make an oral presentation of their proposal to the evaluation team at a designated Boone County location. Attendance cost shall be at the Offeror's expense. All arrangements and scheduling will be coordinated by the County.

5.1.4. Evaluation:

5.1.4.1. Experience and reliability of the Offeror's organization are considered subjectively in the evaluation process. Therefore, the Offeror is advised to submit any information, which documents successful and reliable experience in past performances, especially those performances related to the requirements of this RFP.

5.1.4.2. The Offeror should provide the following information related to previous and current services/contracts performed by the Offeror's organization and any proposed subcontractors which are similar to the requirements of this RFP (This

information may be shown on the form attached as Attachment B to this RFP or in a similar manner):

- a. Name, address, and telephone number of client/contracting agency and a representative of that client/agency who may be contacted for verification of all information submitted;
 - b. Dates and locations of the service/contract; and
 - c. A brief, written description of the specific prior services performed and requirements thereof.
- 5.1.4.3. The Offeror should submit a copy of all licenses, certifications, accreditation, and/or permits, which may be required by state, federal, and/or local law, statute, or regulation in the course of conduct of the Offeror's business. If not submitted with the proposal, the County reserves the right to request and obtain a copy of any license or certification required to perform the defined services prior to contract award.
- 5.1.4.4. Proposals will be subjectively evaluated based on the Offeror's distinctive plan for performing the requirements of the RFP. Therefore, the Offeror should present a written narrative, which demonstrates the method or manner in which the Offeror proposes to satisfy these requirements. The language of the narrative should be straightforward and limited to facts, solutions to problems, and plans of action.
- 5.1.4.5. Where the words "shall" or "must" are used, they signify a required minimum function of system capacity that will heavily impact the Bidder's final response rating.
- 5.1.4.6. Where the words "should", "may" or "desired" are used, they signify that the feature or capacity is desirable but not mandatory; therefore, the specifications in question will possess minimal impact on the Bidder's final response rating.
- 5.1.4.7. The method by which the proposed method of performance is written will be left to the discretion of the Offeror. However, the Offeror should address each specific paragraph and subparagraph of the Specifications by paragraph and page number as an item for discussion. Immediately below these numbers, write descriptions of how, when, by whom, with what, to what degree, why, where, etc, the requirements will be satisfied.

5.1.5. Rejection / Withdrawal of Proposals Response:

Rejection of Proposals The County reserves the right, at its discretion, to reject any or all proposals or parts thereof. The County reserves the right to waive defects or informalities, to negotiate with Offeror's and to accept the proposal deemed to be in the best interest of the County.

Withdrawal of Proposals - Proposals may be withdrawn on written request from the Offeror at the address shown in the solicitation prior to the time of acceptance.

Negligence on the part of the Offeror in preparing the proposal confers no right of withdrawal after the time fixed for the acceptance of the proposals.

5.1.6. Validity of Proposal Response:

Offerors agree that proposals will remain firm for a period of ninety (90) calendar days after the date specified for the return of proposals.



6. Response/Pricing Page

In compliance with this Request for Proposal and subject to all the conditions thereof, the Offeror agrees to furnish the services/equipment/supplies requested and proposed and certifies he/she has read, understands, and agrees to all terms, conditions, and requirements of this proposal and is authorized to contract on behalf of the firm named below. (Note: This form must be signed. All signatures must be original and not photocopies).

Company Name: _____

Address: _____

Telephone: _____ Fax: _____

Federal Tax ID (or Social Security #): _____

Print Name: _____ Title: _____

Signature: _____ Date: _____

E-Mail Address: _____

Item #	Description	Quantity	Unit Price	Extended Total
6.1	Base Software Package including installation & implementation	1	\$ _____	\$ _____
6.5	Data Import/Conversion	1	\$ _____	\$ _____
6.6	Training	1	\$ _____	\$ _____
6.7	First Year Software Maintenance	1	\$ _____	\$ _____
6.8	TOTAL			\$ _____

Please attach additional information and pricing for optional modules or features.

6.9. On-Going Software Maintenance

2nd Year \$ _____

3rd Year \$ _____

4th Year \$ _____

5th Year \$ _____

6.11 Purchasing Cooperative:

Will you honor the submitted prices for purchase by other entities in Boone County who participate in cooperative purchasing with Boone County, Missouri?

_____ Yes

_____ No

STANDARD TERMS AND CONDITIONS - BOONE COUNTY, MISSOURI

1. Responses shall include all charges for packing, delivery, installation, etc., (unless otherwise specified) to the Boone County Department identified in the Request for Bid and/or Proposal.
2. The Boone County Commission has the right to accept or reject any part or parts of all bids, to waive technicalities, and to accept the offer the County Commission considers the most advantageous to the County. Boone County reserves the right to award this bid on an item-by-item basis, or an "all or none" basis, whichever is in the best interest of the County.
3. Bidders must use the bid forms provided for the purpose of submitting bids, must return the bid and bid sheets comprised in this bid, give the unit price, extended totals, and sign the bid.
4. When products or materials of any particular producer or manufacturer are mentioned in our specifications, such products or materials are intended to be descriptive of type or quality and not restricted to those mentioned.
5. Do not include Federal Excise Tax or Sales and Use Taxes in bid process, as law exempts the County from them.
6. The delivery date shall be stated in definite terms, as it will be taken into consideration in awarding the bid.
7. The County Commission reserves the right to cancel all or any part of orders if delivery is not made or work is not started as guaranteed. In case of delay, the Contractor must notify the Purchasing Department.
8. In case of default by the Contractor, the County of Boone will procure the articles or services from other sources and hold the Bidder responsible for any excess cost occasioned thereby.
9. Failure to deliver as guaranteed may disqualify Bidder from future bidding.
10. Prices must be as stated in units of quantity specified, and must be firm. Bids qualified by escalator clauses may not be considered unless specified in the bid specifications.
11. No bid transmitted by fax machine or e-mail will be accepted.
12. The County of Boone, Missouri expressly denies responsibility for, or ownership of any item purchased until same is delivered to the County and is accepted by the County.
13. The County reserves the right to award to one or multiple respondents. The County also reserves the right to not award any item or group of items if the services can be obtained from a state or other governmental entities contract under more favorable terms.
14. The County, from time to time, uses federal grant funds for the procurement of goods and services. Accordingly, the provider of goods and/or services shall comply with federal laws, rules and regulations applicable to the funds used by the County for said procurement, and contract clauses required by the federal government in such circumstances are incorporated herein by reference. These clauses can generally be found in the Federal Transit Administration's Best Practices Procurement Manual – Appendix A. Any questions regarding the applicability of federal clauses to a particular bid should be directed to the Purchasing Department prior to bid opening.
15. In the event of a discrepancy between a unit price and an extended line item price, the unit price

shall govern.

16. Should an audit of Contractor's invoices during the term of the Agreement, and any renewals thereof, indicate that the County has remitted payment on invoices that constitute an over-charging to the County above the pricing terms agreed to herein, the Contractor shall issue a refund check to the County for any over-charges within 30-days of being notified of the same.
17. FOB Destination: All deliveries shall be made FOB Destination with freight charges fully included and prepaid. The seller pays and bears the freight charges.

Boone County Purchasing

Amy Robbins
Senior Buyer



613 E. Ash Street, Room 109
Columbia, MO 65201
Phone: (573) 886-4392
Fax: (573) 886-4390

INSTRUCTIONS FOR COMPLIANCE WITH HOUSE BILL 1549

House Bill 1549 addresses the Department of Homeland Security's and the Social Security Administration's E-Verify Program (Employment Eligibility Verification Program) that requires the County to verify "lawful presence" of individuals when we contract for work/service; verify that contractor has programs to verify lawful presence of their employees when contracts exceed \$5,000; and a requirement for OSHA safety training for public works projects.

The County is required to obtain certification that the bidder awarded the attached contract participates in a federal work authorization program. To obtain additional information on the Department of Homeland Security's E-Verify program, go to:

<http://www.uscis.gov/portal/site/uscis/menuitem.eb1d4c2a3e5b9ac89243c6a7543f6d1a/?vgnextoid=75bce2e261405110VgnVCM1000004718190aRCRD&vgnnextchannel=75bce2e261405110VgnVCM1000004718190aRCRD>

Please complete and return form *Work Authorization Certification Pursuant to 285.530 RSMo* if your contract amount is in excess of \$5,000. **Attach to this form the first and last page of the *E-Verify Memorandum of Understanding* that you completed when enrolling for proof of enrollment.**

If you are an Individual/Proprietorship, then you must return the attached *Certification of Individual Bidder*. On that form, you may do one of the three options listed. Be sure to attach any required information for those options as detailed on the *Certification of Individual Bidder*. If you choose option number two, then you will also need to complete and return the attached form *Affidavit*.

AFFIDAVIT
(Only Required for Certification of Individual Bidder (Option #2))

State of Missouri)
)SS.
County of _____)

I, the undersigned, being at least eighteen years of age, swear upon my oath that I am either a United States citizen or am classified by the United States government as being lawfully admitted for permanent residence.

Date

Signature

Social Security Number
or Other Federal I.D. Number

Printed Name

On the date above written _____ appeared before me and swore that the facts contained in the foregoing affidavit are true according to his/her best knowledge, information and belief.

Notary Public

My Commission Expires:

(Please complete and return with Contract)

**Certification Regarding
Debarment, Suspension, Ineligibility and Voluntary Exclusion
Lower Tier Covered Transactions**

This certification is required by the regulations implementing Executive Order 12549, Debarment and Suspension, 29 CFR Part 98 Section 98.510, Participants' responsibilities. The regulations were published as Part VII of the May 26, 1988, Federal Register (pages 19160-19211).

(BEFORE COMPLETING CERTIFICATION, READ INSTRUCTIONS FOR CERTIFICATION)

- (1) The prospective recipient of Federal assistance funds certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective recipient of Federal assistance funds is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

Name and Title of Authorized Representative

Signature

Date



PRIOR EXPERIENCE

(References of similar services for governmental agencies are preferred)

1. Prior Services Performed for:

Company Name:

Address:

Contact Name:

Telephone Number:

Date of Contract:

Length of Contract:

Description of Prior Services (include dates):

2. Prior Services Performed for:

Company Name:

Address:

Contact Name:

Telephone Number:

Date of Contract:

Length of Contract:

Description of Prior Services (include dates):

3. Prior Services Performed for:

Company Name:

Address:

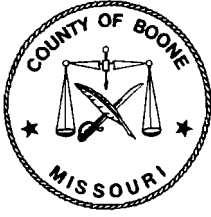
Contact Name:

Telephone Number:

Date of Contract:

Length of Contract:

Description of Prior Services (include dates):



"No Bid" Response Form

Boone County Purchasing
613 E. Ash Street, Room 109
Columbia, MO 65201

Amy Robbins, Senior Buyer
(573) 886-4392 – Fax: (573) 886-4390

"NO BID RESPONSE FORM"

NOTE: COMPLETE AND RETURN THIS FORM ONLY IF YOU DO NOT WANT TO SUBMIT A PROPOSAL RESPONSE

If you do not wish to respond to this proposal request, but would like to remain on the Boone County vendor list for this service, please remove form and return to the Purchasing Department by mail or fax.

If you would like to FAX this "No Bid" Response Form to our office, the FAX number is (573) 886-4390.

Proposal: 33-03SEP13 - Fleet Maintenance Software

Business Name: _____

Address: _____

Telephone: _____

Contact: _____

Date: _____

Search Results

Current Search Terms: collective* Data* Inc.*

Notice: This printed document represents only the first page of your SAM search results. More results may be available. To [print your complete search results, you can download the PDF and print it.](#)
No records found for current search.

SAM | System for Award Management 1.0

IBM v1.1278.20131018-1401

Note to all Users: This is a Federal Government computer system. Use of this system constitutes consent to monitoring at all times.





IOWA SECRETARY OF STATE Matt Schultz

[Home](#) [Business Services](#) [Search Databases](#) [Online Filing](#) [Elections](#) [Notaries](#) [Notary Seal](#)

[Home](#) » [Search Databases](#) » [Business Entities](#) » [Results](#) » [Summary](#)

Business Entity Summary

[print](#)

[Summary](#) [Address](#) [Agent](#) [Filings](#) [Names](#) [Officers](#) [Stock](#) [Search Again](#)

[Print Certificate of Existence](#)

Searched: **Collective Data, Inc.**

Business No.	Legal Name	Status
205972	COLLECTIVEDATA, INC.	Active
Type	State of Inc.	Modified
Legal	IA	No
Expiration Date	Effective Date	Filing Date
PERPETUAL	5/1/1997	5/1/1997
Chapter	CODE 490 DOMESTIC PROFIT	

Names (Viewing 3 of 3)

Type	Status	Modified	Name
Legal	Active	No	COLLECTIVEDATA, INC.
Fictitious name	Inactive	No	AUTO-DO-IT
Legal	Inactive	No	CHAMPION SOFTWARE, INC.

Registered Agent or Reserving Party

Full Name	Address	Address 2	City, State, Zip
ROBERT J O'SHEA	2735 1ST AVE SE STE 205		CEDAR RAPIDS, IA, 52402

Home Office

Full Name	Address	Address 2	City, State, Zip
COLLECTIVEDATA INC	230 2ND STREET SE	SUITE 414	CEDAR RAPIDS, IA, 52401

STAY CONNECTED



VOTER FRAUD HOTLINE
1-888-508-VOTE



HOW CAN THE SECRETARY HELP YOU?



NEWS ROOM



CONSTITUENT SERVICES

FEATURED RESOURCES

[QUICK LINKS](#) [ONLINE SERVICES](#) [SEARCH](#)

- Am I Registered to Vote in Iowa?
- Track Your Absentee Ballot
- Request an Absentee Ballot
- Find My Polling Place
- Business Entity Forms & Fees
- Business Entities Search
- UCC Search

JOIN OUR MAILING LIST

Email Address

[Back to Top](#)

Secretary of State
First Floor, Lucas Building
321 E. 12th St.
Des Moines, IA 50319

[Home](#) | [State of Iowa](#) | [Sitemap](#) | [Disclaimer](#) | [Contact Us](#)
sos@sos.iowa.gov | (515) 281-5204

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
 County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the following budget amendment for the Treasurer's Office to pay invoices for the mowing of Rocky Fork Cemetery.

Department	Account	Department Name	Account Name	Decrease \$	Increase \$
7230	71110	Rocky Fork Cemetery	Contract Labor		531

Done this 19th of November, 2013.

ATTEST:

Wendy S. Noren
 Wendy S. Noren
 Clerk of the County Commission

Daniel K. Atwill
 Daniel K. Atwill
 Presiding Commissioner

Karen M. Miller
 Karen M. Miller
 District I Commissioner

Janet M. Thompson
 Janet M. Thompson
 District II Commissioner

Tansy Johnson - Re: Fwd: Dept 7230 budget 2013

From: Nicole Galloway
To: Johnson, Tansy
Date: 10/24/2013 8:36 AM
Subject: Re: Fwd: Dept 7230 budget 2013

The cemetery will stop being mowed at the end of October.

In addition to the Sept invoice, there should be two more mowings in October at \$132.61 each.

>>> Tansy Johnson 10/22/13 12:52 PM >>>

Nicole,

The invoice Hilary is referring to below is for the lawn care at Rocky Fork Cemetery. Isn't there something about only paying for that if there is money available? And, if not, should the budget amendment be for more then this pay req as they may perform more lawn care services between now and the end of the year?

Tansy Johnson

Accountant

Boone County Treasurer

801 E. Walnut, Rm. 205

Columbia, Missouri 65201

Ph. (573) 886-4366 Fax. (573) 886-4369

tjohnson@boonecountymo.org

>>> Hilary Matney 10/22/2013 12:42 PM >>>

Hey Tansy!

The payment req you submitted for 7230 71110 will put you over budget for the year. Will you please submit a budget amendment at your earliest convenience? I'll go ahead an sign off on this one since the revenue is clearly sufficient to cover an amendment.

Thanks,
Hilary

PAYMENT REQUISITION BOONE COUNTY, MISSOURI



10/15/2013
REQUISITION
DATE

11/14/2013
VENDOR
DUE DATE

TRANS: 2013 004884

Check Routing Instructions

014388
VENDOR
NO.

POEHLMANN'S LAWN & LANDSCAPE LLC
VENDOR NAME

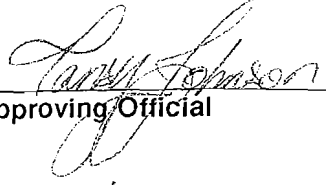
01-27JAN11
BID NUMBER

Notes:

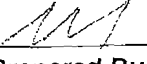
* = INSUFFICIENT BUDGET

Fund / Dept	Account	Invoice Number	Customer Account Number	Amount
* 7230	71110	17745	ROCKY FORK CEMETARY LAWN CARE:9/10/13	132.61
* 7230	71110	17874	ROCKY FORK CEMETARY LAWN CARE 9/23/13	132.61
GRAND TOTAL :				265.22

I certify that the goods, services or charges above specified are necessary for the use of the department, are solely for the benefit of the county, and have been procured in accordance with statutory bidding requirements.



 Approving Official



 Prepared By

Approving Official

County Commission Approval

Approving Official

Auditor Approval



POEHLMANN'S

Lawn & Landscape LLC

1206 War Admiral Dr.
Columbia, MO 65202

573-819-3851
PLL.Columbia@gmail.com
PLL-Columbia.com

Bill To

Rocky Fork Cemetery
c/o Nicole Galloway
601 E. Walnut #205
Columbia, MO 65201

Date
10/14/2013

Payment is due upon receipt.

Statement of services provided

			Amount Due
			\$265.22
Date	Description	Amount	Balance
08/31/2013	Balance forward		265.22
09/10/2013	INV #17745. --- Mowing and Trimming, 1 @ \$132.61 = 132.61 --- Tax: Sales Tax @ 7.6% = 0.00	132.61	397.83
09/13/2013	PMT #177443.	-265.22	132.61
09/23/2013	INV #17874. --- Mowing and Trimming, 1 @ \$132.61 = 132.61 --- Tax: Sales Tax @ 7.6% = 0.00	132.61	265.22

Current	1-30 Days Past Due	31-60 Days Past Due	61-90 Days Past Due	Over 90 Days Past Due	Amount Due
0.00	265.22	0.00	0.00	0.00	\$265.22

Thank you for your business. Balances not paid by the first of the following month will be subject to a finance charge of 1.5%.

Fall is a great time to plant most trees with deciduous trees and shrubs preparing to go dormant. This gives them time to get comfortable in their new home before taking off in the spring. Let us know if you have any trees or shrubs that need removed or replaced. Keep us in mind for Christmas lights!

Nathan Martin - Fwd: Statement from Poehlmann's Lawn and Landscape

From: Nicole Galloway
To: NLMartin@boonecountymo.org
Date: 10/15/2013 9:06 AM
Subject: Fwd: Statement from Poehlmann's Lawn and Landscape
Attachments:

Begin forwarded message:

From: "Jody Moore" <jmoore@boonecountymo.org>
Date: October 15, 2013 at 9:03:15 AM CDT
To: "Nicole Galloway" <NGalloway@boonecountymo.org>
Subject: Fwd: Statement from Poehlmann's Lawn and Landscape

>>> Anthony Poehlmann <pll.columbia@gmail.com> 10/14/2013 2:30 PM >>>

Dear Galloway :

Attached, please find our invoice for services performed by Poehlmann's Lawn and Landscape. Please contact me if you have any questions or concerns.

Sincerely,

Anthony Poehlmann
Poehlmann's Lawn and Landscape
573-819-3851

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
 County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

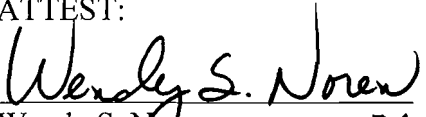
the following, among other proceedings, were had, viz:

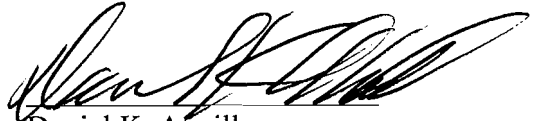
Now on this day the County Commission of the County of Boone does hereby approve the following budget amendment for the Sheriff's Department to purchase golf carts.

Department	Account	Department Name	Account Name	Decrease \$	Increase \$
2540	92300	Sheriff Civil Charges	Replacement Machine and Equipment		6,297

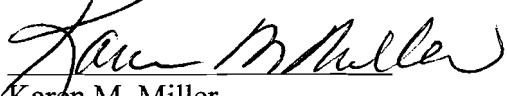
Done this 19th of November, 2013.

ATTEST:

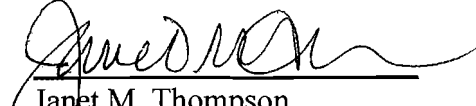

 Wendy S. Noren
 Clerk of the County Commission


 Daniel K. Atwill

Presiding Commissioner


 Karen M. Miller

District I Commissioner


 Janet M. Thompson

District II Commissioner

Year	2013	Original Appropriation	16,995.00
Dept	2540 SHERIFF CIVIL CHARGES	Revisions	
Acct	90000 FIXED ASSET ADDITIONS	Original + Revisions	16,995.00
Fund	254 SHERIFF CIVIL CHARGES FUND	Expenditures	9,595.00
		Encumbrances	
Class/Account	C CLASS	Actual To Date	9,595.00
Account Type	E EXPENSE	Remaining Balance	7,400.00
Normal Balance	D DEBIT	Shadow Balance	7,400.00

Expenditures by Period

January	7,595.00	July	
February		August	
March		September	2,000.00
April		October	
May		November	
June		December	

F2=Key Scr F3=Exit F5=Ledger Transactions F7=Transactions F9=Budget

7,400.000 +
-
*

Boone County Purchasing

Amy Robbins
Senior Buyer



613 E. Ash Street, Rm. 109
Columbia, MO 65201
(573) 886-4392
(573) 886-4390

TO: Cpt. Chad Martin / Sheriff Department

FROM: Amy Robbins
Senior Buyer / Purchasing

DATE: November 1, 2013

RE: Bid Award Recommendation – 44-01NOV13 – Golf Carts

Attached is the bid tabulation for the one response received for the above referenced bid. Please return this cover sheet with your recommendation by e-mail or fax to 886-4390 after you have completed the evaluation of this bid. If you have any questions, please call or e-mail me.

DEPARTMENT REPLY:

Please complete the following:

Department Number: 2540

Account Number: 912300

Budgeted: \$ 8000.00 + BA for remainder

Award Bid by low bid to M&M Golf Cars, LLC.

Recommend accepting the following bid(s) for reasons detailed on attached page. (Attach department recommendation).

Recommend rejecting all bids for reasons detailed on attached page. (Attach department recommendation).

Administrative Authority Signature. 

Date: 11-4-13

Bid Tabulation

44-01NOV13 - Golf

Carts

M&M Golf Cars, LLC				
PRICING	Manuf / Model	Unit Price	Qty	Extended Price
4.8. New 2013 or 2013 Club Car Carryall 242 (or equal) Gas-Powered Golf Cart	2013-14 Club Car Carryall 242 Gas-Powered Golf Cart	\$6,848.50	\$2.00	\$13,697.00
4.8.1. Tire Tread on cart proposed:	All-Trail II 20x1000-8, 4-ply			
Upgrade Tread Type			\$0.00	
Upgrade Tread Type			\$0.00	
4.9. Warranty Details	Full detailed warranty attached to bid; Limited 2 year on engine, transaxle, starter, motor, fram, bed, cab assembly & doors; Limited 1 year on solenoid, MCOR, limit switches, voltage regulators, F&R switches, brakes, wiring, electrical, canopy, seats, body; 4 years on onboard computer, controller & battery charger			
4.10. Additional Options				
Option	Chrome SS Style Hub Cap (wheel covers)	1 set	\$0.00	No Charge
Option			\$0.00	
Option			\$0.00	
Option			\$0.00	
Option			\$0.00	

No Bid:

Fund Statement - Sheriff Civil Charges Fund 254 (Nonmajor)

	2012 Actual	2013 Budget	2013 Estimated	2014 Budget
FINANCIAL SOURCES:				
Revenues				
Property Taxes	\$ -	-	-	-
Assessments	-	-	-	-
Sales Taxes	-	-	-	-
Franchise Taxes	-	-	-	-
Licenses and Permits	-	-	-	-
Intergovernmental	-	-	-	-
Charges for Services	50,000	50,000	50,000	50,000
Fines and Forfeitures	-	-	-	-
Interest	300	309	279	279
Hospital Lease	-	-	-	-
Other	-	-	-	-
Total Revenues	50,300	50,309	50,279	50,279
Other Financing Sources				
Transfer In from other funds	-	9,251	-	-
Proceeds of Long-Term Debt	-	-	-	-
Other (Sale of Capital Assets, Insurance Proceeds, etc)	-	-	-	-
Total Other Financing Sources	-	9,251	-	-
Fund Balance Used for Operations	-	10,006	19,384	883
TOTAL FINANCIAL SOURCES	\$ 50,300	69,566	69,663	51,162
 FINANCIAL USES:				
Expenditures				
Personal Services	\$ -	-	-	-
Materials & Supplies	-	1,500	1,500	1,500
Dues Travel & Training	-	-	-	-
Utilities	2,446	2,640	2,775	2,794
Vehicle Expense	-	-	-	-
Equip & Bldg Maintenance	298	328	328	346
Contractual Services	1,642	1,806	1,768	1,737
Debt Service (Principal and Interest)	-	-	-	-
Emergency	-	-	-	-
Other	-	-	-	-
Fixed Asset Additions	-	23,292	23,292	4,785
Total Expenditures	4,386	29,566	29,663	11,162
Other Financing Uses				
Transfer Out to other funds	40,000	40,000	40,000	40,000
Early Retirement of Long-Term Debt	-	-	-	-
Total Other Financing Uses	40,000	40,000	40,000	40,000
TOTAL FINANCIAL USES	\$ 44,386	69,566	69,663	51,162
 FUND BALANCE:				
FUND BALANCE (GAAP), beginning of year	\$ 18,243	24,157	24,157	4,773
Less encumbrances, beginning of year	-	-	-	-
Add encumbrances, end of year	-	-	-	-
Fund Balance Increase (Decrease) resulting from operations	5,914	(10,006)	(19,384)	(883)
FUND BALANCE (GAAP), end of year	24,157	14,151	4,773	3,890
Less: FUND BALANCE UNAVAILABLE FOR APPROPRIATION, end of year				
	\$ -	-	-	-
NET FUND BALANCE, end of year	\$ 24,157	14,151	4,773	3,890

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
 County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

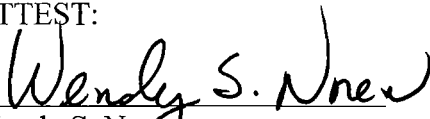
In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the Subrecipient Monitoring Agreement between Boone County and the City of Columbia per the FY2013 Justice Assistance Grant (JAG) Program Award. The terms of the agreement are stipulated in the attached Agreement. It is further ordered the Presiding Commissioner is hereby authorized to sign said Subrecipient Monitoring Agreement.

Done this 19th day of November, 2013.

ATTEST:

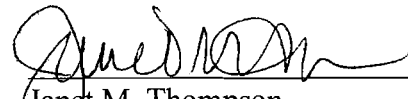

 Wendy S. Noren
 Clerk of the County Commission



Daniel K. Atwill
 Presiding Commissioner



Karen M. Miller
 District I Commissioner



Janet M. Thompson
 District II Commissioner

**SUBRECIPIENT MONITORING AGREEMENT
BETWEEN THE CITY OF COLUMBIA, AND
THE COUNTY OF BOONE, MISSOURI**

FY 2013 JUSTICE ASSISTANCE GRANT (JAG) PROGRAM AWARD

THIS AGREEMENT dated the 19th day of November, 2013, is made by and between Boone County, Missouri through its County Commission (herein "County"), and the City of Columbia, Missouri (herein "City"),

WHEREAS, both the City and the County are empowered to enter into a cooperative agreement for the purposes herein stated pursuant to RSMo §70.220; and

WHEREAS, the City and County are participants in the Justice Assistance Grant Program, Award #2013-DJ-BX-0573, and have been awarded funds thereunder; and

WHEREAS, the County acts as the applicant/fiscal agent for the joint funds for purposes of the aforementioned grant; and

WHEREAS, the City acts as the subrecipient for purposes of said grant; and

WHEREAS, in order to comply with the terms of the grant, certain additional agreements are required to provide reasonable assurance that the Federal award compliance requirements are met.

NOW, THEREFORE, the County and City agree as follows:

1. The City, consistent with its current external auditing practices, agrees to subject expenditures under the Justice Assistance Grant Program Award, Award #2013-DJ-BX-0573, to single audit protocols as dictated by OMB Circular A-133.

2. The City agrees to provide County with information reasonably requested to comply with the "subrecipient monitoring" requirements of A-133 Compliance supplement, copies of which are attached hereto and incorporated herein by reference.

3. The City will provide the County a report based upon its OMB-Circular A-133 audit relating to the expenditures of the funds it receives under the Intergovernmental Cooperative Agreement between the City and the County relating to the Justice Assistance Grant Program Award for Fiscal Year 2013.

4. The City agrees to comply with all provisions and requirements as set out by the Department of Justice in connection with the award of the subject grant. To the extent that the City's expenditures of the grant are questioned by the Department of Justice or its designee and amounts are determined to be disallowed or required to be paid

back to the Department of Justice, the City will make said payment consistent with the requirements of the Department of Justice.

5. The parties will cooperate with each other to furnish any and all documentation required to comply with the requirements of the subject grant.

6. This agreement relates to FY 2013 Justice Assistance Grant Program Award #2013-DJ-BX-0573, CFDA #16.738.

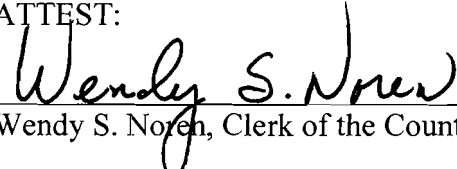
IN WITNESS WHEREOF, the individual parties, by and through their duly authorized representatives signatories, have executed this agreement on the day and year above first written.

COUNTY OF BOONE

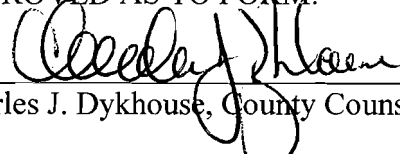
By its County Commission

By: 
Daniel K. Atwill, Presiding Commissioner

ATTEST:

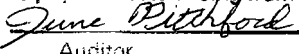

Wendy S. Noren, Clerk of the County Commission

APPROVED AS TO FORM:


Charles J. Dykhouse, County Counselor

CERTIFICATION:

I certify that this contract is within the purpose of the appropriation to which it is to be charged and there is an unencumbered balance of such appropriation sufficient to pay the costs arising from this contract.

 11/7/2013
Auditor Date
No Encumbrance Required

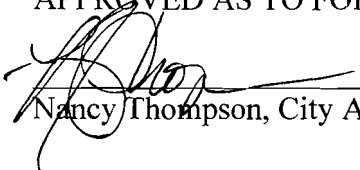
CITY OF COLUMBIA

By: 
Mike Matthes, City Manager

ATTEST:


Sheela Amin, City Clerk

APPROVED AS TO FORM:


Nancy Thompson, City Attorney

M. SUBRECIPIENT MONITORING

Control Objectives

To provide reasonable assurance that Federal award information and compliance requirements are identified to subrecipients, subrecipient activities are monitored, subrecipient audit findings are resolved, and the impact of any subrecipient noncompliance on the pass-through entity is evaluated. Also, the pass-through entity should perform procedures to provide reasonable assurance that the subrecipient obtained required audits and takes appropriate corrective action on audit findings.

Control Environment

- Establishment of “tone at the top” of management’s commitment to monitoring subrecipients.
- Management’s intolerance of overriding established procedures to monitor subrecipients.
- Entity’s organizational structure and its ability to provide the necessary information flow to monitor subrecipients are adequate.
- Sufficient resources dedicated to subrecipient monitoring.
- Knowledge, skills, and abilities needed to accomplish subrecipient monitoring tasks defined.
- Individuals performing subrecipient monitoring possess knowledge, skills, and abilities required.
- Subrecipients demonstrate that:
 - They are willing and able to comply with the requirements of the award, and
 - They have accounting systems, including the use of applicable cost principles, and internal control systems adequate to administer the award.
- Appropriate sanctions taken for subrecipient noncompliance.

Risk Assessment

- Key managers understand the subrecipient’s environment, systems, and controls sufficient to identify the level and methods of monitoring required.
- Mechanisms exist to identify risks arising from external sources affecting subrecipients, such as risks related to:
 - Economic conditions.
 - Political conditions.
 - Regulatory changes.
 - Unreliable information.
- Mechanisms exist to identify and react to changes in subrecipients, such as:
 - Financial problems that could lead to diversion of grant funds.
 - Loss of essential personnel.
 - Loss of license or accreditation to operate program.
 - Rapid growth.
 - New activities, products, or services.

- Organizational restructuring.

Control Activities

- Identify to subrecipients the Federal award information (e.g., CFDA title and number, award name, name of Federal agency, amount of award) and applicable compliance requirements.
- Include in agreements with subrecipients the requirement to comply with the compliance requirements applicable to the Federal program, including the audit requirements of OMB Circular A-133.
- Subrecipients' compliance with audit requirements monitored using techniques such as the following:
 - Determining by inquiry and discussions whether subrecipient met thresholds requiring an audit under OMB Circular A-133.
 - If an audit is required, assuring that the subrecipient submits the report, report package or the documents required by OMB circulars and/or recipient's requirements.
 - If a subrecipient was required to obtain an audit in accordance with OMB Circular A-133 but did not do so, following up with the subrecipient until the audit is completed. Taking appropriate actions such as withholding further funding until the subrecipient meets the audit requirements.
- Subrecipient's compliance with Federal program requirements monitored using such techniques as the following:
 - Issuing timely management decisions for audit and monitoring findings to inform the subrecipient whether the corrective action planned is acceptable.
 - Maintain a system to track and following-up on reported deficiencies related to programs funded by the recipient and ensure that timely corrective action is taken.
 - Regular contacts with subrecipients and appropriate inquiries concerning the Federal program
 - Reviewing subrecipient reports and following-up on areas of concern.
 - Monitoring subrecipient budgets.
 - Performing site visits to subrecipient to review financial and programmatic records and observe operations.
 - Offering subrecipients technical assistance where needed.
- Official written policies and procedures exist establishing:
 - Communication of Federal award requirements to subrecipients.
 - Responsibilities for monitoring subrecipients.
 - Process and procedures for monitoring.
 - Methodology for resolving findings of subrecipient noncompliance or weaknesses in internal control.
 - Requirements for and processing of subrecipient audits, including appropriate adjustment of pass-through entity's accounts.

Information and Communication

- Standard award documents used by the non-Federal entity contain:
 - A listing of Federal requirements that the subrecipient must follow. Items can be specifically listed in the award document, attached as an exhibit to the document, or incorporated by reference to specific criteria.
 - The description and program number for each program as stated in the CFDA. If the program funds include pass-through funds from another recipient, the pass-through program information should also be identified.
 - A statement signed by an official of the subrecipient, stating that the subrecipient was informed of, understands, and agrees to comply with the applicable compliance requirements.
- A recordkeeping system is in place to assure that documentation is retained for the time period required by the recipient.
- Procedures are in place to provide channels for subrecipients to communicate concerns to the pass-through entity.

Monitoring

- Establish a tracking system to assure timely submission of required reporting, such as: financial reports, performance reports, audit reports, onsite monitoring reviews of subrecipients, and timely resolution of audit findings.
- Supervisory reviews performed to determine the adequacy of subrecipient monitoring.

interoffice
MEMORANDUM

to: Ken Burton, Police Chief
from: Sheela Amin, City Clerk
subject: B322-13 – Subrecipient Monitoring Agreement with Boone
County re: FY 2013 JAG Program Award
date: November 5, 2013

Ken,

Enclosed are three (3) original agreements associated with B322-13. I would appreciate it if you would see to it that the proper people sign the agreements. Once signed, please return one original copy of the agreement to my office to be placed with the associated ordinance as the official record.

Thank you and if you have any questions, please call (874-7207) or e-mail (skamin@gocolumbiamo.com).

Sheela

021887

021887
Filed in Clerk's Office

Introduced by McDavid

First Reading 10-21-13

Second Reading 11-4-13

Ordinance No. 021887

Council Bill No. B 322-13

AN ORDINANCE

authorizing a subrecipient monitoring agreement with Boone County, Missouri relating to acceptance of the FY 2013 Justice Assistance Grant (JAG) Program Award to purchase equipment for the Police Department; appropriating funds; and fixing the time when this ordinance shall become effective.

BE IT ORDAINED BY THE COUNCIL OF THE CITY OF COLUMBIA, MISSOURI, AS FOLLOWS:


SECTION 1. The City Manager is hereby authorized to execute a subrecipient monitoring agreement with Boone County, Missouri relating to acceptance of the FY 2013 Justice Assistance Grant (JAG) Program Award to purchase equipment for the Police Department. The form and content of the agreement shall be substantially in the same form as set forth in "Exhibit A" attached hereto.

SECTION 2. The sum of \$26,335.20 is hereby appropriated from the Federal Revenues Account No. 110-2120-461.10-19 GBRYNE to the Instruments/Apparatus Account No. 110-2120-510.14-70 GBRYNE.

SECTION 3. This ordinance shall be in full force and effect from and after its passage.

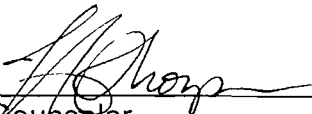
PASSED this 4th day of November, 2013.

ATTEST:


City Clerk


Mayor and Presiding Officer

APPROVED AS TO FORM:



City Counselor

CERTIFICATION: I certify there are sufficient funds available in the Federal Revenues Account No. 110-2120-461.10-19 GBRYNE to cover the above appropriation.



Director of Finance

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby accept the Security Agreement and Letter of Credit for the Sunrise Estates Subdivision Wastewater System Improvements. It is further ordered the Presiding Commissioner is hereby authorized to sign the attached Stormwater Erosion and Sediment Control Security Agreement.

Done this 19th day of November, 2013.

ATTEST:

Wendy S. Noren
Wendy S. Noren
Clerk of the County Commission

Daniel K. Atwill

Daniel K. Atwill
Presiding Commissioner

Karen M. Miller

Karen M. Miller
District I Commissioner

Janet M. Thompson

Janet M. Thompson
District II Commissioner

Stormwater Erosion and Sediment Control Security Agreement

Date: October 24, 2013

Developer/Owner Name: Boone County Regional Sewer District
Address: 1314 North 7th St
Columbia, MO 65201

Development: Plat: Sunrise Estates Subdivision Wastewater Improvements

This agreement is made by and between the above named developer (herein "Developer") and Boone County, Missouri, a political subdivision of the State of Missouri, through its Public Works Department, (herein "County") and shall be effective on the above date when signed and approved by all persons listed below.

In consideration of the performance based by each party of their respective obligations described in this agreement, the parties agree to the following:

- 1. Background and Purpose of Agreement** – The Developer is the owner or authorized agent of the owner for the real estate contained within the development described above which is subject to the Boone County Stormwater Regulations. This agreement is made pursuant to Section 8, in Chapter 28 of the Subdivision Regulations of Boone County, Missouri in order to permit the Developer to disturb land on the development described above, and to assure County of the required erosion and sediment control and stormwater management. By entering into this agreement the developer is agreeing to comply with the erosion and sediment plan described below in accordance with the County Stormwater Regulations and specifications and provide to County financial security in the event the developer fails to comply with the plan, or complete the improvements within the time and manner provided for by this agreement.
- 2. Description of Improvements** – The Developer agrees to adhere to the Stormwater Pollution Prevention Plan (SWPPP) and Erosion and Sediment Control (ESC) Plans for Construction activities at **Sunrise Estates Sewer Interceptor and Lagoon Closure**. The SWPPP and ESC was prepared by **Engineering Surveys and Services** on **September 30, 2013**.
- 3. Time for Completion** – The Developer agrees to complete the land disturbance activities and stabilize the site as described in the SWPPP no later than the **August 2015**, and all such improvements shall pass County inspection as of this date.
- 4. Security for Performance** – To secure the Developer's performance of its obligations under this agreement, Developer hereby agrees to provide the County with security in the amount of \$ 44,205, which County may use and apply for Completion of the above described improvements in the event the Developer fails to complete the above described

improvements within the time or within manner required by County under its regulations. The Security shall be provided to County as a condition precedent to the effectiveness of this agreement in the following form:

- U Cash deposit with County Treasurer
- X Irrevocable standby letter of credit, with form to be approved by County and issued to Treasurer of Boone County, Missouri
- U Certificate of Deposit issued by FDIC insured bank for a term of xx months.
- U Corporate surety bond issued to Boone County, Missouri

5. **Use of Security** – The Developer hereby authorizes County to use, redeem, or otherwise obtain payment as applicable, from the security described above for purposes of completing improvements required of the Developer under this agreement in the event that such improvements are not completed within the time provided for by this agreement, or any extension thereof granted by County in its discretion, or in the event such improvements are not completed in accordance with regulatory requirements or specifications imposed by County. Developer authorizes County to cash the **irrevocable letter of credit** contemplated herein upon written instructions from the duly-elected and serving Treasurer of Boone County without further authorization or signature required by Developer. In the event Developer fulfills its obligations in the time and manner required by this agreement and obtains a satisfactory final inspection from the County prior to **August 2015**, then County shall provide Developer with written proof that the requirements of this Security Agreement are satisfied and the **irrevocable letter of credit** can be released to Developer. If no written proof has been provided to the financial institution issuing the **irrevocable letter of credit** that Developer has complied with the requirements of this Agreement, however, then the financial institution shall, on **August 2015**, or such extended period as mutually-agreed by the parties in writing, shall immediately transfer the balance of the **irrevocable letter of credit** to the account then-designated by the Boone County Treasurer. If the total sum of the **irrevocable letter of credit** is not used for completion of any necessary permit items, then the remaining balance shall be paid to Developer within thirty (30) days of completion and acceptance of any required work, along with an itemization of charges detailing the expenditures made by the County.
6. **Additional Sums Due** – In the event that the security provided herein is insufficient to complete the required improvements as determined by the County, Developer will, upon demand by the County accompanied by a detailed itemization of the requested additional sum, deposit with County such additional monies which, in the opinion of the County, will be required to complete the necessary improvements. In the event that Developer does not deposit the additional monies with the County within ten (10) days, the Developer shall be deemed in default of this Agreement.
7. **Remedies Cumulative** – Exercise or waiver by the County of any enforcement action under this Agreement does not waive or foreclose any other or subsequent enforcement


action whatsoever. The County shall be entitled to its costs, including reasonable attorneys' fees, in enforcement of Developer's obligations under this Agreement.

8. **Authority of Representative Signatories** – Signatories to this agreement who execute this agreement in a representative capacity for a corporation, limited liability company or partnership, or other business entity, hereby affirmatively represent that they have obtained all resolutions or orders needed to enter in this agreement and are duly authorized to enter into this agreement and bind the parties which they represent to all terms and conditions herein.
9. **Binding Effect** – This agreement shall be binding upon the parties hereto in their respective heirs, personal representative, administrators, successors and interest in successors in assigned offices. The County and Developer hereby accept this Agreement as a lawful and satisfactory Security Agreement.

In Witness Whereof the Developer and the County have executed this agreement to be effective on the day and year first above written.

ACKNOWLEDGED AND AGREED TO:

Developer/Owner:

By: 

Printed Name: Tom Ratermann

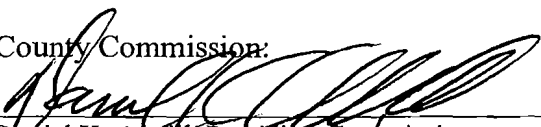
Title: General Manager

BOONE COUNTY, MISSOURI:

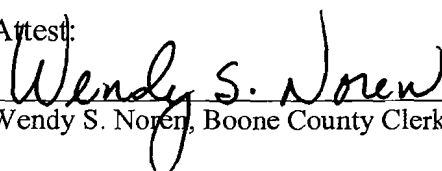
Department of Resource Management


Stan Shawver, Director Resource Management

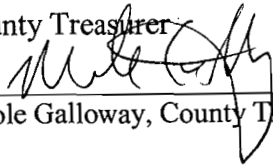
County Commission:


Daniel K. Atwill, Presiding Commissioner

Attest:

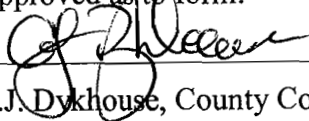

Wendy S. Noren, Boone County Clerk *my*

County Treasurer



Nicole Galloway, County Treasurer

Approved as to form:



C.J. Dykhouse, County Counselor

Boone County National Bank



IRREVOCABLE LETTER OF CREDIT

NO. 0382390-0399

DATE: October 17, 2013

Amount: \$44,205.00

Re: Sunrise Estates NE & NW Sewer Interconnect

County of Boone

Attn: Director, Resource Management

801 E Walnut St, Rm. 315

Columbia, MO 65201

Ladies and Gentlemen:

We hereby authorize the County of Boone to draw on the **Boone County National Bank** for the account of the Boone County Regional Sewer District, up to an aggregate amount of \$44,205.00 available by your drafts at sight. Your drafts must be accompanied by your invoice to Owner and accompanied by a Certificate for Drawing in substantially the form set out on Exhibit "A", which is attached hereto and incorporated by reference.

All drafts hereunder must be marked "Drawn under **Boone County National Bank** Letter of Credit #0382390-0399 Dated 10/17/2013."

The amount of each draft drawn under this credit must be endorsed hereon, and the presentation of each draft, if negotiated, shall be a warranty by the negotiating bank that such endorsement has been made and that documents have been forwarded as herein requested. Partial drawings are permitted. All payments under this letter of credit will be made available to you at the counters of the loan issuer or immediately by wire transfer of immediately available funds to the account(s) designated by the Boone County Treasurer.

We hereby engage with the drawers, endorsers, and bona fide holders of drafts drawn under and in compliance with the terms of this credit that the same will be duly honored on due presentation and delivery of documents as specified if presented to this bank on or before October 18, 2014, provided further that upon such expiration, either at October 18, 2014, or such extended period as contemplated herein we shall immediately transfer the balance of the maximum available credit to you at the account then-designated by the Boone County Treasurer.

This letter of credit may be extended upon presentation of an agreement to extend, executed by the Developer/Owner and the County of Boone, and presented to **Boone County National Bank** within the 60-day period prior to the then-effective date of expiration of this letter of credit.

Upon our receipt, from time to time, from the County of Boone, of a written reduction certificate in

substantially the same form as Exhibit "B", which is attached hereto and incorporated herein by reference, we are authorized to reduce the maximum available credit hereunder by the amount stated in such certificate, any such reduction to be effective only at our close of business on the date which we receive said written reduction certificate.

This letter of credit sets forth in full our undertaking, and such undertaking shall not in any way be modified, amended, amplified, or limited by reference to any document, instrument or agreement referred to herein, except that Exhibit "A" and Exhibit "B" attached hereto are incorporated herein by reference as an integral part of this letter of credit.

This Letter of Credit is subject to the Uniform Customs and Practice for Documentary Credits (2007 Revision) of the International Chamber of Commerce Publication No. 600. However, if this Credit contains a drawing schedule or a schedule of availability, then Article 32 of the UCP is hereby expressly deleted. In addition, if this Letter of Credit expires during the interruption of business as described in Article 36 we hereby specifically agree to effect payment if this letter of Credit is drawn against within thirty (30) days after resumption of business.

Sincerely yours,


By: 
Dawn Shellabarger, Assistant Vice President Commercial Banking

Exhibit "A"
To Letter of Credit
Form of Certificate for Drawing

Boone County, Missouri letterhead

Date

Boone County National Bank
720 E. Broadway
Columbia, MO 65201
Attention: Dawn Shellabarger, Assistant Vice President Commercial Banking

Re: Boone County National Bank Letter of Credit No.: 0382390-0399
Dated: 10/17/13
In Favor of Boone County, Missouri on behalf of Boone County Regional Sewer
District for Sunrise Estates NE & NE Sewer Interconnect

Gentlemen:

The undersigned, a duly authorized official of County of Boone, Missouri (the "Beneficiary"), hereby certifies to Boone County National Bank (the "Bank"), with reference to Irrevocable Letter of Credit No. 0382390-0399 (the "Letter of Credit"; any capitalized terms used herein and not defined shall have their respective meanings as set forth in the said Letter of Credit) issued by the Bank in favor of the Beneficiary, that:

1. The Account Party has failed to complete all improvements or fulfill all obligations required by the Subdivision Regulations, Stormwater regulations, or other applicable rules and regulations of the County of Boone.
2. A draft in the sum of \$_____ as requested by this Certificate is not in excess of the Maximum Available Credit under the Letter of Credit and shall result in a reduction of the Maximum Available Credit under the Letter of Credit.

Transfer the funds as stated above to the credit of the Boone County, Missouri to the following account, as instructed by the Boone County Treasurer: [INSERT BANK Account #_____], Attention: Boone County Treasurer.

IN WITNESS WHEREOF, the Beneficiary has executed and delivered this certificate this _____ day of _____.

BOONE COUNTY, MISSOURI

By: _____
Presiding Commissioner

APPROVED BY:

Attest:

Stan Shawver, Director Resource Management

Wendy S. Noren, Boone County Clerk
Commission Order: _____

Exhibit "B"
To Letter of Credit
Form of Reduction Certificate

Boone County, Missouri letterhead

Date

Boone County National Bank
720 E. Broadway
Columbia, MO 65201
Attention: Dawn Shellabarger, Assistant Vice President, Commercial Banking

Re: Boone County National Bank Letter of Credit No.: 0382390-0399
Dated: 10/17/13
In Favor of Boone County, Missouri on behalf of Boone County Regional Sewer
District for Sunrise Estates NE & NW Sewer Interconnect

Gentlemen:

This certificate authorizes reduction in the amount of \$_____ of the above letter of credit. The
remaining maximum available credit for this letter of credit is \$_____.

BOONE COUNTY, MISSOURI

By: _____
Presiding Commissioner

APPROVED BY:

Attest:

Stan Shawver, Director, Planning & Building

Wendy S. Noren, Boone County Clerk

Commission Order: _____

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby proclaim November 20, 2013 to be Geographic Information Systems Day throughout Boone County. It is further ordered the Boone County Commissioners are hereby authorized to sign the attached proclamation

Done this 19th day of November, 2013.

ATTEST:

Wendy S. Noren
Wendy S. Noren
Clerk of the County Commission

Daniel K. Atwill
Daniel K. Atwill
Presiding Commissioner

Karen M. Miller
Karen M. Miller
District I Commissioner

Janet M. Thompson
Janet M. Thompson
District II Commissioner

Proclamation for Geographic Information Systems Day

Whereas, geography has played a defining role in the settlement, history and cultural heritage of Boone County, our nation and humanity; and

Whereas, Geography Awareness Week will be celebrated November 17-23, 2013 to promote geographic literacy in schools, organizations and the community to help us understand the interconnected geographic makeup we share with the entire world; and

Whereas, the management, use and exchange of geographic information is essential for effective decision making; and

Whereas, Geographic Information Systems (GIS) Day is November 20, 2103; and

Whereas, Geographic Information Systems (GIS) technologies are a powerful tool for supporting emergency services, homeland security, economic development, environmental protection, crime mapping, healthcare, long-range planning and much more; and

Whereas, extensive efforts are underway to meet the need to promote GIS awareness, education and technical training among various groups to most appropriately and wisely use this rapidly developing technology; and

Whereas, Boone County is committed to expanding GIS to the schools and general public in order to showcase real-world applications with GIS;

Therefore, we, the honorable members of the Boone County Commission, do hereby proclaim November 20, 2013 to be Geographic Information Systems Day throughout Boone County.

IN TESTIMONY WHEREOF, this 19th day of November, 2013.

Daniel K. Atwill, Presiding Commissioner

Karen M. Miller, District I Commissioner

Janet M. Thompson, District II Commissioner

ATTEST:

Wendy S. Noren, County Clerk

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

In the County Commission of said county, on the 19th day of November 20 13

the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby approve the Organizational Use of the Government Center Chambers by the Columbia Farmers Market for January 7, 2014, February 4, 2014 and March 4, 2014 from 5:30 p.m. to 9:30 p.m.

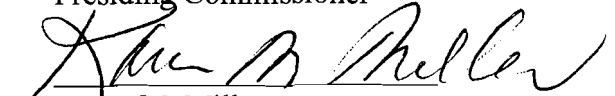
Done this 19th day of November, 2013.

ATTEST:

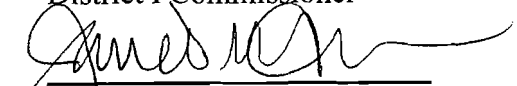
Wendy S. Noren
Wendy S. Noren
Clerk of the County Commission



Daniel K. Atwill
Presiding Commissioner



Karen M. Miller
District I Commissioner



Janet M. Thompson
District II Commissioner

Daniel K. Atwill, Presiding Commissioner
Karen M. Miller, District I Commissioner
Janet M. Thompson, District II Commissioner



Roger B. Wilson
Boone County Government Center
801 East Walnut, Room 333
Columbia, MO 65201-7732
573-886-4305 • FAX 573-886-4311

Boone County Commission

APPLICATION FOR ORGANIZATIONAL USE OF BOONE COUNTY CONFERENCE ROOMS

The undersigned organization hereby applies for a use permit to use the Roger B. Wilson Boone County Government Center conference rooms or Centralia Satellite Office as follows:

Organization: Columbia Farmers Market

Address: P.O. Box 10012

City: Columbia State: MO. ZIP Code: 65201

Phone: 573-823-6889 Website: columbiafarmersmarket@gmail.net

Individual Requesting Use: Art Gelder Position in Organization: President

Facility requested: Chambers Room 301 Room 311 Room 332 Centralia Clinic

Event: General Membership Meetings

Description of Use (ex. Speaker, meeting, reception): meeting

Date(s) of Use: 1-8-2013, 2-4-2013, 3-4-2013

Start Time of Setup: 7:30 PM AM/PM Start Time of Event: 6:00 PM AM/PM

End Time of Event: 9:00 PM AM/PM End Time of Cleanup: 9:30 PM AM/PM

The undersigned organization agrees to abide by the following terms and conditions in the event this application is approved:

1. To abide by all applicable laws, ordinances and county policies in using Boone County Government conference rooms.
2. To remove all trash or other debris that may be deposited (by participants) in rooms by the organizational use.
3. To repair, replace, or pay for the repair or replacement of damaged property including carpet and furnishings in rooms.
4. To conduct its use in such a manner as to not unreasonably interfere with Boone County Government building functions.
5. To indemnify and hold the County of Boone, its officers, agents and employees, harmless from any and all claims, demands, damages, actions, causes of action or suits of any kind or nature including costs, litigation expenses, attorney fees, judgments, settlements on account of bodily injury or property damage incurred by anyone participating in or attending the organizational use of rooms as specified in this application.

Organization Representative/Title: Art Gelder / President

Phone Number: 573-474-8837 Date of Application: 11-13-2013

Email Address: agelder.waa@gmail.com

PERMIT FOR ORGANIZATIONAL USE OF BOONE COUNTY GOVERNMENT CONFERENCE ROOMS

The County of Boone hereby grants the above application for permit in accordance with the terms and conditions above written. The above permit is subject to termination for any reason by duly entered order of the Boone County Commission.

ATTEST:

Wendy S. Nover
County Clerk

BOONE COUNTY, MISSOURI

Daniel K. Atwill
County Commissioner

DATE: 11-19-13

CERTIFIED COPY OF ORDER

STATE OF MISSOURI }
 County of Boone } ea.

November Session of the October Adjourned

Term. 20 13

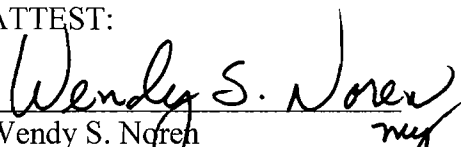
In the County Commission of said county, on the 19th day of November 20 13

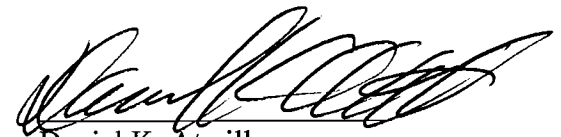
the following, among other proceedings, were had, viz:

Now on this day the County Commission of the County of Boone does hereby authorize a closed meeting on Tuesday, November 19, 2013, at 1:30 p.m. The meeting will be held in Room 338 of the Roger B. Wilson Boone County Government Center at 801 E. Walnut, Columbia, Missouri, as authorized by RSMo 610.021(1), to discuss legal actions, causes of action or litigation involving a public governmental body and any confidential or privileged communications between a public governmental body or its representatives and its attorneys.

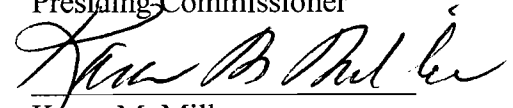
Done this 19th of November, 2013.

ATTEST:


 Wendy S. Noren
 Clerk of the County Commission



Daniel K. Atwill
 Presiding Commissioner



Karen M. Miller
 District I Commissioner



Janet M. Thompson
 District II Commissioner