



May 23, 2022

Ms. Maritza Felix
Senior Contract Officer
201 N Stone Avenue
6th Floor North
Tucson, AZ 85701

RE: City of Tucson RFQ 222849 On Call Plan Review Services

Dear Ms. Felix:

IBTS understands the City is seeking firms with qualifications, credentials and experience to provide on-call plan review services. In response to the RFQ, IBTS has assembled a multi-disciplinary team of plan examiners, engineers, and planners who have the experience to meet the City's needs.

For more than 20 years, IBTS has provided Building Department Services including Permitting, Plan Review, and Inspection, among other services, to more than 50 jurisdictions in more than 25 states and US Territories and our Project Manager has experience working in Maricopa County, Mesa and Scottsdale. We have a long track record of providing the types of services listed in the Tucson RFQ in large cities like Washington D.C., where we work closely with the City's staff during each stage of the review process. Our attention to detail and the quality of our work have enabled us to make the transition from being a contractor to becoming a trusted partner in each community we serve.

The IBTS Team will be led by Arizona-based Project Director, David Groves, PE. Mr. Groves will work closely with Tucson to develop a seamless connection between the City and IBTS. He will be supported by Plan Review Manager, David Wei Lu, RA, EIT, MCP, CBO. Mr. Lu and Mr. Groves have worked together for more than six years on many similar projects, including multi-million-dollar development projects to support FEMA, the Maryland Stadium Authority, the Washington Metropolitan Airports Authority, Washington DC's Department of Community and Regulatory Affairs, the World Bank, among others.

Please Contact Us With Any Questions

We look forward to working with the City of Tucson. Should you have any questions, please contact me at 703.851.4187 or cfennell@ibts.org. If I am unavailable, please contact Chris Miller, Director, Local Government Services at 678.576.7352 or email at cmiller@ibts.org.

Sincerely,

A handwritten signature in blue ink, appearing to read 'C. Fennell', written in a cursive style.

Christopher J. Fennell
Chief Development Officer



Institute for Building Technology and Safety
45207 Research Place | Ashburn, VA 20147



Statement of Qualifications in Response to City of Tucson Request for Qualifications 222849

On Call Plan Review Services

Due: May 23, 2022

Institute for Building Technology
and Safety (IBTS)



Point of Contact:

Christopher J. Fennell
Chief Development Officer
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cfennell@ibts.org

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1. Experience and Qualifications of Team

The City of Tucson is seeking firms with qualifications, credentials, and experience to provide on call plan review services in the form of a multi-disciplinary team to meet the needs of its applicants and owners.

IBTS Plan Review Services. Headquartered in Ashburn, Virginia, with offices in eleven locations, and serving all states, the Institute for Building Technology and Safety (IBTS) conducts over 5,000 plan reviews per year. The Commonwealth of Virginia Department of General Services (DGS) and the Metropolitan Washington Airports Authority called on IBTS to provide inspections and safety oversight during the \$6.8 billion, 10-year-long Silver Line Extension of the Washington D.C. Metrorail. IBTS is the Building Code Authority Having Jurisdiction for the Virginia Commonwealth University Health System (VCU Health System) and is performing all building department services for about 2 million square feet of hospital and support space across multiple buildings in and around Richmond, Virginia. The Maryland Stadium Authority (MSA) selected IBTS to review plans and carry out code inspections for the design and construction of 28 Baltimore City public schools being built or substantially renovated under its 21st Century Schools Programs.

For more than 20 years, IBTS has provided Building Department Services including Permitting, Plan Review, and Inspection, among other services, to more than 50 jurisdictions across the country, and our Project Manager has experience working in Maricopa County, Mesa, and Scottsdale.

We provide on call plan review services for each of these communities, working in partnership with the City's Plan Review Division in times when project requirements exceed in-house qualifications or capabilities. We will work seamlessly to perform third-party code compliance, decreasing turnaround times, maintaining a high level of customer service, and upholding the safety of residents and the community while also working to improve quality of life for all Tucson citizens.

Building Department Accreditation. IBTS has been accredited as a building department third-party plan review and inspection service provider by multiple jurisdictions across the U.S. for more than 20 years.

Professional Registration and Licensing. All key personnel are licensed engineers or architects, and certified by the ICC as Master Code Professionals, Certified Building Officials, Combination Commercial & Residential Plans Examiners, and Inspectors, among other certifications.

IBTS will draw on our depth of experience and technical expertise to provide the plan review and inspection services the City of Tucson seeks.

A. Experience and Qualifications of Team IBTS

Arizona-based Project Director, David Groves, PE, will lead provision of all the services the City is seeking. He will be supported by Plan Review Manager, David Wei Lu, RA, EIT, MCP, CBO. Mr. Lu and Mr. Groves have worked together for more than six years on many similar projects, including multi-million-dollar development projects to support FEMA, the Maryland Stadium Authority, the Washington Metropolitan Airports Authority, Washington DC's Department of Community and Regulatory Affairs, the World Bank, among others.

Experience and Qualifications of Team Members

David Groves, PE, Project Director/Plan Reviewer. Mr. Groves has 23 years of professional experience, including 16 years as an Inspector, Plans Examiner, and Senior Fire Plans Examiner for Mesa, Scottsdale, and Maricopa County. He is an Arizona-licensed Architectural Engineer and Fire Protection Engineer. He is an ICC Certified Building Official, Master Code Professional, and Combination Commercial and Residential Inspector and Plans Examiner. He is an expert in municipal plan submittal, review, and approval processes. He is an Owner's Quality Control Representative for large-scale



commercial/industrial construction projects. Mr. Groves uses his extensive knowledge of International Codes and National Fire Protection Association standards while designing and reviewing building, fire, and life safety plans and systems.

David Wei Lu, RA, CBO, MCP, Plan Review Manager. Mr. Lu is a Licensed Architect, with a master’s degree in Structural Engineering and an Engineer in Training (EIT) certification. He is an ICC Certified Building Official, Master Code Professional, and Combination Commercial and Residential Inspector and Plans Examiner. He has 20 years of professional experience in building and infrastructure construction with extensive knowledge of both residential and commercial architectural and structural design, including 16 years managing Plan Review for IBTS. He led building code compliance review for numerous multibuilding, multimillion square foot mixed-use development and other projects across numerous jurisdictions, including 50 military installations across the United States.

For this project, Mr. Lu will receive and assess all plan review requests, and personally conduct or assign reviews to one or more of ten registered professional review engineers, based on scope, discipline, and availability. Mr. Lu will prioritize and schedule all reviews and oversee and perform a quality check on all reviews before returning review comments or recommendations to approve to the City of Tucson staff or contractor, as applicable. He will review plan revisions, requests for information, engineering judgements and similar, as requested. Plan Check Engineers will report directly to Mr. Lu; Mr. Lu will report directly to David Groves.

Staff with their corresponding licenses, registrations, and certifications are provided in the following table.

Table 1. Project Team Professional Registration/Discipline and ICC Certifications

Name/Project Title	Professional Licenses/Registration	Discipline	ICC Certifications*
David Groves Project Director Plan Reviewer	PE	Fire/Life Safety	<ul style="list-style-type: none"> • Certified Building Official • Master Code Professional • Combination Plans Examiner and Inspector • Fire Plans Examiner
David Wei Lu Plan Review Manager Plan Reviewer	RA, EIT	All	<ul style="list-style-type: none"> • Certified Building Official • Master Code Professional • Combination Plans Examiner and Inspector
Douglas Applegate Plan Reviewer	PE	Fire/Life Safety	<ul style="list-style-type: none"> • Building Plans Examiner • Fire Plans Examiner
Art Genasci, MCP, CFM, CBO, CQA Plan Reviewer		Building/Electrical/Fire/Housing/Mechanical/Plumbing/Structural	<ul style="list-style-type: none"> • Certified Building Official • Certified Fire Code Official • Master Code Professional • ASFPM Certified Floodplain Manager • ASQ Certified Quality Auditor
Mustafa Ghaith Plan Reviewer		Mechanical/Plumbing	<ul style="list-style-type: none"> • Mechanical Plans Examiner • Plumbing Plans Examiner • Energy Plans Examiner • Green Plans Examiner

Tong Li Plan Reviewer	PE, SE	Structural	<ul style="list-style-type: none"> • Certified Accessibility Inspector • Building Plans Examiner • Commercial Energy Plans Examiner
Wisam Rabeea Plan Reviewer	PE	Mechanical/ Plumbing	<ul style="list-style-type: none"> • Mechanical Plans Examiner • Plumbing Plans Examiner
Aashish Shahani Plan Reviewer	PE	Electrical	<ul style="list-style-type: none"> • Electrical Plans Examiner • Commercial Energy Inspector/Plans Examiner • Residential Energy Inspector/Plans Examiner
Fuen Soh Plan Reviewer	PE	Structural	<ul style="list-style-type: none"> • Commercial Energy Plans Examiner • IgCC Commercial Inspector/Plans Examiner • Residential Energy Inspector/Plans Examiner • Residential Plans Examiner
Steve Wilson Plan Reviewer	PE	Electrical	<ul style="list-style-type: none"> • Electrical Plans Examiner
Jim Ferguson Plan Reviewer	PE	Site	<ul style="list-style-type: none"> • Floodplain Manager • Stormwater Inspector • NHI Certified Bridge Inspector • D.WRE (American Academy of Water Resources Engineers)

*Certified Building Official, Certified Fire Code Official, Master Code Professional, and Combination Plans Examiner/Inspector designations represent numerous individual certifications including individual discipline plan review certifications.

Subconsultants. For this project, IBTS will use four long-time subconsultants: Art Genasci, MCP, CFM, CBO, CQA; Tong Li, PE, SE; Aashish Shahani, PE; and Steve Wilson, PE.

Additional Relatable Services Including Field Inspections. IBTS understands that we may be required to provide the City with additional relatable services, such as field inspections, on an as-needed basis.

If field inspections are required by the City, Michael Maenner will be the Inspections Manager. He has 30+ years of professional experience, including building inspector and plan reviewer and 13 ICC certifications. He will assign and coordinate inspections with his team of inspectors and report on the inspections. He will review plan revisions, requests for information, engineering judgements and similar, and either issue judgements on compliance, or coordinate with David Groves to further review and to ensure compliance with applicable codes and standards and engineering practice. Inspectors will report directly to Mr. Maenner; and he will report directly to David Groves.

Resumes are provided for David Groves and David Wei Lu in **Appendix A**. Other resumes are available upon request.

Team Experience on Similar Projects/Extent of Team Involvement Including Time Commitment

Table 2 on the following page depicts the plan review team’s involvement on similar projects.



Table 2. Project Team Extent of Involvement on Similar Plan Review Projects

	Project 1: Baltimore, MD, City Public Schools Construction Program	Project 2: City of Central, LA	Project 3: Dulles Corridor Metrorail Silver Line Extension
Team Member	<i>Discipline % of time contributed</i>	<i>Discipline % of time contributed</i>	<i>Discipline % of time contributed</i>
David Groves, PE, CBO, MCP	Fire/Life Safety 10%		Fire/Life Safety 10%
David Wei Lu, RA, EIT, CBO, MCP	All 10%		All 10%
Douglas Applegate, PE	Fire/Life Safety 10%		Fire/Life Safety 10%
Art Genasci, MCP, CFM, CBO, CQA	Building/Electrical/Fire/Hou sing/Mechanical/Plumbing/ Structural 10%		Building/Electrical/Fire/Hou sing/Mechanical/Plumbing/ Structural 10%
Mustafa Ghaith	Mechanical/ Plumbing 10%		Mechanical/ Plumbing 10%
Tong Li, PE, SE	Structural 10%		Structural 10%
Wisam Rabeea, PE	Mechanical/ Plumbing 10%		Mechanical/ Plumbing 10%
Aashish Shahani, PE	Electrical 10%		Electrical 10%
Fuen Soh, PE	Structural 10%		Structural 10%
Steve Wilson, PE	Electrical 10%		Electrical 10%
Jim Ferguson, PE		Site 25%	

Other Applicable Details, Licenses, Information Relating to Work That Can Be Performed Outside of Arizona

IBTS personnel are certified by the ICC as Certified Building Officials, Master Code Professionals, Combination Commercial and Residential Inspectors and Plans Examiners, among others. Project Director David Groves is a licensed Architectural Engineer and a licensed Fire Protection Engineer in Arizona. David Wei Lu is a Registered Architect. Mr. Lu and Mr. Jim Ferguson, site plan reviewer, have applied for reciprocity with the State of Arizona, which may take 60 days to receive.

- ***Evidence of Responsible Principal and Primary Staff “Hands On” Experience in Site Design, Engineering, Hydrology, and Structural Design and Code Review of the Following Disciplines: Planning, Floodplain, Technical Building Codes, Accessibility Guidelines and Development Standards***



IBTS' site development plan review team performs zoning & planning, E&S control, stormwater management, roadway design, dry and wet onsite utility design reviews for multiple jurisdictions in 2nd party and 3rd party plan review programs. Our primary site development plan reviewers have combined experience of more than 50 years of design and plan review experiences. We also provide building department services for various jurisdictions throughout the nation for architectural, accessibility, structural, mechanical, plumbing, electrical, fire, and energy & green plan reviews. The combined design and plan review experiences of our primary plan reviewers for building department services are more than 200 years. Several of our site and building plan reviewers served in the public sectors in leadership positions before joining IBTS. Most of IBTS' building plan reviewers were licensed design professionals prior to entering the field of building code enforcement.

IBTS brings decades of "hands on" experience. In the areas in site design engineering and hydrology (including drainage and floodplain), our staff brings the practical knowledge of design and construction. This knowledge along with Diplomate, Water Resources Engineer (D.WRE) Certification, the highest level of advanced post-license certification offered in the water resources engineering profession for professional engineers and an accredited certification program by the Council of Engineering & Scientific Specialty Boards, allows IBTS to analyze and evaluate site plans at the highest level of competency.

- ***Demonstration of specific Experience and Qualifications in Electrical, Plumbing and Mechanical Review***

Our mechanical, electrical, and plumbing (MEP) reviewers have performed MEP reviews on a wide-range of construction from single-family homes to large commercial, institutional, and industrial facilities including multiple new high-rise hospitals in the cities of Richmond and Winchester, VA; eight data centers and supporting facilities in Fairfax County, VA, for Amazon; \$125 million-dollar pharmaceutical production facilities in City of Petersburg for Phlow Corporation; two high-rise offices, two high-rise apartments, and two high-rise condominium buildings with 3-level underground parking garage to replace the old DC Convention Center for a joint venture between the District of Columbia and Hines Corporation, just to name a few.

B. Response to the National or Regional Program

IBTS is including a detailed response to Attachment I, Exhibit A, OMNIA Partners Response for the National Cooperative contract. Our response highlights our experience, demonstrates our strong national presence, and describes how we will educate our staff and sales force about the contract. We describe how our services will be distributed nationwide, include a plan for marketing the service nationwide, and describe how volume will be tracked and reported to OMNIA Partners.

The OMNIA Partners response is at Appendix B.

b. Exhibit B, OMNIA Partners Administration Agreement

IBTS understands that upon award to participate in the cooperative program, we will be required to sign Attachment I, Exhibit B, OMNIA Partners Administration Agreement. IBTS has reviewed this agreement and does not take any exceptions to it.

c. Any Additional Sample Agreements

IBTS does not have any additional sample agreements that a Participating Public Agency may be required to sign at this time.



d. Distribution (Nationwide or Regionally)

IBTS is proposing a national program. IBTS provides services throughout the United States. We have eleven offices in the following locations: Ashburn (Headquarters) and Richmond, VA; Albany and Hudson Valley, NY; Bossier City and City of Central, LA; Kansas City, MO; Omaha, NE; Oklahoma City, OK; Washington, DC; and San Juan, PR.

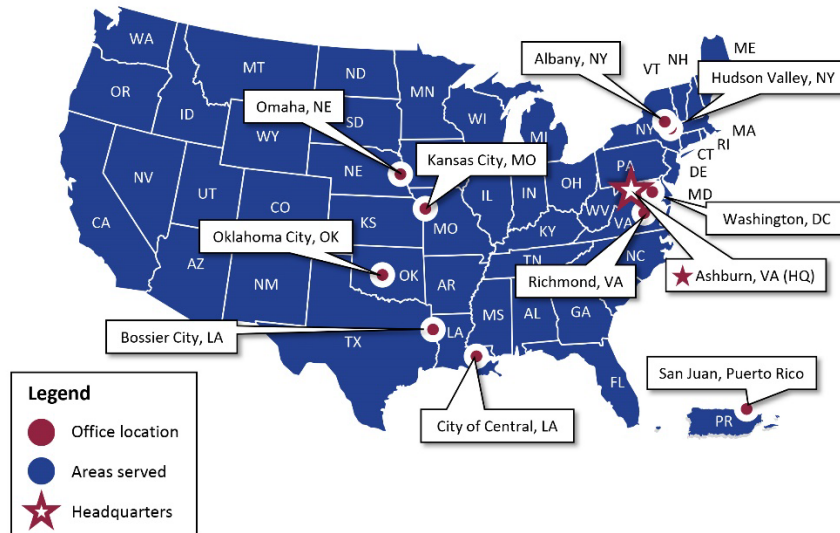


Figure 1: IBTS’ National Coverage. IBTS is currently serving all 50 states and the U.S. territories.

2. Services and Qualifications of Firm

A. Qualifications and Why IBTS is especially well qualified to perform the required services

As stated in *Standard One* below, all IBTS plan reviewers and inspectors are licensed professional architects or engineers and/or ICC certified professionals.

Internal policies and procedures that will be used to assure a quality product and completion of the project on schedule and within budget.

Professional Reputation, Integrity, and Competence. IBTS has three tiers of performance standards.

Standard One: All our plan reviewers and inspectors are licensed professional architects or engineers and/or ICC certified professionals. IBTS is a building code training provider certified by AIA, IACET, and ICC. We provide more than 40 hours of continuing education per year in Health, Safety, and Public Welfare-related technical trainings to our plan review and inspection staff in addition to soft-skill trainings.

Standard Two: IBTS has developed and uses a rigorous plan review and inspection procedures manual over the years with detailed performance standards tailored to each project.

Standard Three: IBTS plan review and inspection managers are committed to problem solving and undivided focus on delivering value to the project and an excellent customer experience.

Throughout our decades-long history, we have continuously upheld these standards, earning us a reputation as a firm of high integrity and competence. Increasingly, communities around the country

seek out IBTS, entrusting us to ensure the safety of residents and the community through our quality, high performance services. We hope to have the opportunity to serve the City of Tucson.

IBTS' Process for Reviewing Plans

IBTS will complete plan reviews in accordance with requirements of Tucson adopted codes and standards, and in accordance with our general approach.

Our organizational chart identifies our team of reviewers, all Registered Design Professionals led by David Wei Lu, who will review building plans from Schematic Design through Design Development drawings to "permit-ready" Construction Document submission and recommendation to Tucson to approve compliant plans. IBTS will complete plan reviews no later than five working days for residential projects and ten working days for most commercial projects with negotiated turnaround for large, complex projects. For reviews that may require accelerated timeline, IBTS will communicate with appropriate parties to ensure timely project turnaround.

Our structural engineers and fire protection engineers will review deferred submittals to ensure that specified products and systems meet applicable requirements of the building code, its referenced standards, and acceptable engineering practice for construction as applicable.

IBTS' Process for Performing Field Inspections and Associated Reporting Efforts

Detailed, thorough inspections through all stages of construction ensure that compliance issues are resolved from the very beginning, preventing time-consuming and costly reworking further along in the building phase. IBTS will perform Internal 2nd Party Inspections services remotely except where on-site inspections are required by the City. IBTS will provide the following:

Preconstruction Coordination – IBTS will ensure that all parties are "on the same page" with regard to construction inspections. This starts with having, using, and maintaining, a detailed Plan Review and Inspection Procedure Manual. IBTS will prepare this manual in consultation with the City of Tucson and its stakeholders.

On-Time Every Time – IBTS will continue to provide on-demand inspections to ensure that construction is not delayed. Inspections Manager Mr. Maenner, Building Official, recognizes that schedules may need to be adjusted to accommodate delivery schedules, project progress, weather impacts, and many others. Through delivery of hundreds of inspection requests, IBTS has always met requested or negotiated inspection dates. IBTS is currently right-staffed to accommodate completion of current projects, while also inspecting to ensure safe, compliant and timely completion of the City's construction projects at the same time, and will continue to provide on-time inspections every time.

Guaranteed Inspections – The City of Tucson will receive inspections within 48 hours (2 business days) of an inspection request. Recognizing however that construction schedules are at times difficult to maintain, IBTS has and will continue to accommodate inspection requests with a 24-hour notice to the extent practicable. IBTS has redundant inspection resources for each aspect of

IBTS Provides Added Capacity to Meet City's Needs

IBTS provided multiple senior inspectors to perform final inspections on multiple Baltimore City Schools being completed and prepared for occupancy at the start of a school year. IBTS helped develop and work through punch list items and recognized the difference between code compliance and other items that, while important to address, would not delay the opening and safe occupancy of the schools. IBTS will take a similar approach to ensure on-time completion of all buildings and facilities for the City of Tucson.



construction and is currently staffed to deliver timely inspections across multiple projects concurrently in construction at any given time. Virtual inspections will be provided as requested with advance notice to be able to meet the City's needs.

Heads-Up Observations – IBTS inspectors go beyond inspecting, and provide observations and guidance to allow contractors to change course earlier in the construction process, to avoid inspection failures later. IBTS does this with each of our inspection projects and will earn the trust and respect of job-site superintendents and project managers.

Actionable Reporting – The City will receive real-time written reports of inspection findings provided to all applicable parties, supplemented by a comprehensive tracking log of all reports provided monthly.

IBTS is also pioneering the use of technology to improve inspection accountability. Specifically, IBTS has developed a series of SOPs for internet-aided inspections. These inspections are managed remotely using software associated with Microsoft Teams. Using this and other technologies, the local inspection can be viewed in real time by IBTS' ICC-certified inspector. Data collected during the inspection such as photographs at the rough-in stage or videos of the entire inspection are saved in the cloud and become part of the permit database. IBTS is currently providing these inspections in multiple states including Nebraska, Oklahoma and Kansas.

- **Qualifications of any critical subconsultants or subcontractors**

IBTS will use four long-time subconsultants: Art Genasci, MCP, CFM, CBO, CQA; Tong Li, PE, SE; Aashish Shahani, PE; and Steve Wilson, PE, to provide plan review services for the City.

List any specific qualifications in supplying the specified services, including professional registration numbers and the ICC and AICP certificate numbers

Subconsultants' professional licenses/registration and ICC/DHCD Certifications were included in Table 1.

- Chris Miller, AICP (registration # 012370)
- Woodrow Muhammad, AICP (registration # 171862)
- Jennifer Reinhardt, AICP (registration #372314)
- Hillary Seybold, AICP (registration # 343449)
- Jim Ferguson, PE and Certified Floodplain Manager (CFM) (No. US-09-04257NHI); Certified Storm Water Inspector (C.S.I) (No. 8559); Arizona PE license: pending

B. Description of All the Services IBTS can provide

IBTS is qualified and experienced in providing all the services the City of Tucson identified in its Request for Qualifications:

- 1) Internal 2nd Party Plan Review. During these reviews, IBTS will supplement Planning and Development Services Department (PDSD) review staff to meet plan check and processing requirements. IBTS will be responsible for processing and/or reviewing plans for compliance with building and development regulations as adopted by the City of Tucson to include any combination of Building, Plumbing, Mechanical, Electrical Codes, Energy, Accessibility, Civil Engineering, Zoning, and Fire reviews. IBTS will perform these services remotely except where customer service assistance is needed to support front counter operations.
- 2) Internal 2nd Party Inspection. For these inspections, IBTS will supplement PDSD inspection staff to meet field inspection requirements. IBTS will be responsible for inspecting projects for compliance with building and development regulations as adopted by the City of Tucson which may include any combination of Building, Plumbing, Mechanical, Electrical Codes, Energy, and



Accessibility inspections, Civil Engineering, Zoning, and Fire reviews. IBTS will perform these services remotely except where on-site inspections are required based on inspection type or at the discretion of the City.

- 3) Fixed-Rate Inspection. Under a fixed-rate inspection, IBTS will perform remote video inspections for the City of Tucson. IBTS will be responsible for verifying compliance with building and development regulations as adopted by the City of Tucson which may include any combination of Building, Plumbing, Mechanical, Electrical, Energy, and Accessibility inspections. The scope of these inspections will be limited in complexity such that a comprehensive inspection can be completed in 30 minutes or less. Examples of fixed-rate inspections include residential rooftop solar, water heater installation, residential heating and cooling equipment, and minor utility repairs. IBTS will use its own equipment, including computers, monitors, and software to perform the inspections through remote video means in a manner acceptable to the City. IBTS will coordinate transfer of information, including approved construction documents, inspection results, inspection reports, and utility clearances with the City. IBTS understands that the quantity of fixed-rate inspections assigned each day will be agreed upon by the City and IBTS in advance, and will be no fewer than 10 remote video inspections per day.
- 4) Bundled 2nd Party Plan Review (all 4 categories). The City will notify IBTS and arrange for electronic transfer of construction documents and supporting materials to IBTS. These bundled 2nd Party Plan Reviews will be identified in four categories: 1) All Building codes review – includes Building, Plumbing, Mechanical, Electrical, Energy, and Accessibility; 2) Building and Fire; 3) Building and Site – includes Civil Engineering and Zoning; and 4) Building, Site, and Fire. IBTS will complete the plan review no later than five working days for residential and ten working days for commercial plans with valuations up to \$2 million from the date of notification; and complete review for plans having a valuation over \$2 million no later than 20 working days from the date of notification or as negotiated prior to issuance of the notice to proceed.
- 5) External 3rd Party Plan Review. IBTS understands that any permit applicant, pending PDS approval, may be allowed to use IBTS' services under an external or 3rd party plan review. IBTS will contract independently with the applicant and the review fee will be negotiated between the review agency and the client (not PDS).

Additional Services IBTS Would Like to Provide for the City of Tucson, should the City have the need for them:

- 6) Assessments. IBTS has extensive experience with the National Green Building Standard (NGBS). IBTS' Branch Manager Larry Walters, CBO, CFM, NGBS Verifier, has certified 720 units of various NGBS levels for Bronze and Silver certification for Low Income Tax Credit multifamily projects in various cities in Louisiana and in Mississippi. Mr. Walters checks the project and performs a rough and final inspection to ensure that all of the NGBS practices have been met. IBTS submits reports to the Home Innovation Research Lab for the certification once all of the inspections are completed.

The National Green Building Standard® (NGBS) is an ANSI-approved, third-party certified, residential building standard that provides a flexible and affordable way to verify green construction practices in your single-family, multifamily, remodeling and land development projects.

- 7) Planning. IBTS' nationwide team of AICP certified planners, National Charrette Institute certified facilitator experts can support virtually every element of your planning process, from long-range



comprehensive planning to zoning code updates to tailor-made development regulations. Our Planning and Economic Development team at IBTS leverages decades of expertise to support communities with the following needs, and more:

- Specific Project Support
 - Comprehensive Land Use Plans
 - Unified Development Ordinances
 - Adaptive Reuse Studies
 - Placemaking Studies
 - Housing and Retail Studies and Strategies
 - Affordable Housing Plans
 - Downtown Economic Development Strategies
 - Corridor Studies
 - Transportation Planning
 - Charrette Facilitation and Management
 - Parks and Greenway Master Plans
- Ongoing Support
 - Full-time planning and economic development staff to municipal governments, council of governments, and economic development organizations to provide onsite technical support
 - On-call planning and zoning consulting services
 - Project management
 - Administration of special districts, such as downtown development authorities and business improvement districts

8) Zoning and Regulatory Compliance. IBTS offers a highly qualified workforce who are well-versed in the laws and regulations for the jurisdictions in which they work and have broad capabilities to support Building Department needs. IBTS provides on-demand surge and just-in-time building code professionals, including site plans examiners, code inspectors, and administrative support personnel. Our planners have the experience and expertise to compare building plans with local zoning ordinances or land development regulations.

9) Resilience Assessments. As part of our nonprofit mission, IBTS created its Community Resilience Assessment and Framework Tools (CRAFT) assessment tool because we saw a gap between the resilience assessment and planning resources for larger cities and the limited resources for small and mid-sized local governments. Using CRAFT, IBTS helps communities identify resilience vulnerabilities (social, economic, and governance) and provide greater understanding of needs, resources, opportunities, and constraints. For example, following Hurricanes Irma and Maria in 2017, IBTS provided pro bono CRAFT assessments in the municipalities of Maricao, Cabo Rojo, and San German, helping them to prioritize lack of emergency preparedness as a vulnerability and recommending funding sources to address this issue and improve their resilience.

Similarly, to help cities address the disproportionately negative impact climate change has on vulnerable populations, IBTS obtained a grant from the Kresge Foundation to adapt CRAFT to focus on the intersection between social equity and climate change, also called Equitable Climate Resilience (ECR). Following a survey to hundreds of cities nationwide to understand their experiences when addressing social equity in climate resilience planning efforts, we developed a set of 35 indicators used to measure progress on ECR. We piloted CRAFT ECR in three cities: San Leandro, CA, Orlando, FL, and Santa Fe, NM, providing facilitated assessment

sessions with key stakeholders to present our analyses and recommendations based on desk research and assessment results.

3. Available Resources to Complete the Project

A. Analytical Tools, Resources, or Methodologies That May Be Applicable

GOVmotus™. To help jurisdictions manage the complex processes that can overwhelm their building departments, IBTS developed GOVmotus – a hosted software solution that helps manage, automate, and track building department processes.

With customizable packages and tailored configuration, this software solution was built to meet the unique needs of jurisdictions while increasing operational efficiency by streamlining the entire permitting process, from application intake through completion.

With GOVmotus, permitting is centralized, sequential, and automated.

- Hosted by IBTS. No servers to buy, no software to install. It's browser based and works on mobile devices running Chrome or Internet Explorer. We manage and maintain the system so the City doesn't have to.
- Easy to configure and implement. GOVmotus is both affordable (making it attractive to small and mid-sized jurisdictions) and innovative, with many of the features found in more expensive platforms.
- User-friendly and configurable. Different cities have different needs. We developed GOVmotus to be highly configurable – it can be tailored specifically to your city's codes and ordinances. In addition, the user experience is nearly seamless; all documents associated with a permit are linked and permanently stored together, making data retrieval simple and fast. Other features, like the built-in fee calculators, ensure ordinance compliance and reduces loss of revenue.
- A time saver. The GOVmotus contractor portal allows users to easily apply and pay for permits from the convenience of their home or office.
- A tool for customer (citizen) satisfaction. Accurate and timely communication is critical. GOVmotus enhances communication between applicants and other municipal departments.

IBTS currently provides GOVmotus to communities and statewide agencies as a stand-alone resource or as part of our building department services package. GOVmotus can be tailored to meet the needs of large state agencies like The California Department of Forestry and Fire Protection (CAL FIRE) or smaller jurisdictions like Yutan, NE. Instead of a one-size fits all approach, we start with a scoping plan to ensure we meet our client's needs.

Availability of Resources

IBTS is happy to offer GOVmotus to the City of Tucson, should the City be interested. Our organizational chart depicts estimated time commitments for our Project Director and Plan Review Manager.

Organizational Chart with Estimated Time Commitments

The organizational chart that follows depicts the team IBTS is proposing to provide On Call Plan Review Services and inspection services detailed in the City's RFQ. The chart also presents two closely related service areas that IBTS can provide to the City if needed: Planning/Zoning and Regulatory Compliance and Green Building Assessments.



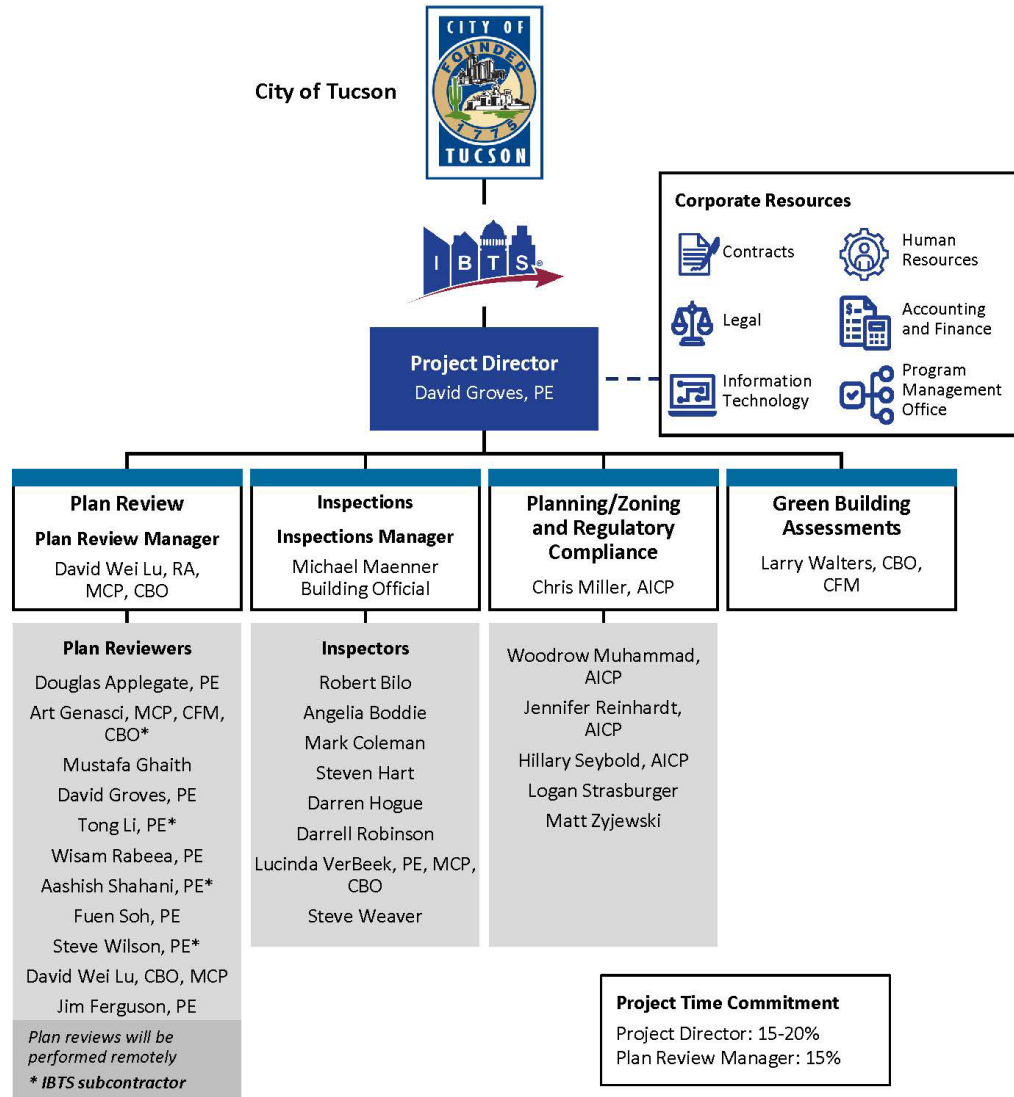


Figure 2: IBTS' Project Team for the City of Tucson, AZ. IBTS is proposing a Project Director, Plan Review Manager, ten plan check engineers, and an Inspections Manager who will assign and oversee on call and remote video inspections. The chart also depicts the related services of Planning/Zoning and Regulatory Compliance and Green Building Assessments that are available should the City require these services in the future.

The IBTS Team will be led by Project Director David Groves, PE, with a Certified Building Official/Master Code Professional reporting directly to him managing all plan reviews. Internal 2nd party inspection and fixed-rate inspections will be led by an experienced project manager and former Deputy Commissioner and Director of Operations for the City of Philadelphia. Plan check engineers and inspectors will report directly to their service manager leads. All proposed individuals have worked together on many projects similar to the services requested by the City of Tucson; all are immediately available to begin work upon award.

Internal Measures That Will Be Used to Ensure Timely Completion

IBTS has a plan review procedure to ensure all our projects are completed and delivered on time:

1. Plan/assignment intake - Once the project is received, the plan intake staff will log the project into our project tracking and reporting software - PRSS.

2. Tracking in internal project management tool (PRSS) - The PRSS system is an IBTS-developed software for project flow management for our plan review team. The schedule for each project will be published on the daily report based on data entry on PRSS. The daily report is sent to each plan reviewer every day.
3. Review assignment - The reviewers will perform reviews and input their review comments onto PRSS one day before the project due date according to project completion schedule shown on the daily report.
4. QC and management review - The plan review services manager will perform quality control (QC) review on the project due date to ensure the review report on PRSS is complete and accurate.
5. Completion and submission - After QC review is complete, the review report will be emailed to our clients by the close of business of the project due date.

4. Firm Experience on Similar Projects

A. IBTS Experience on Similar Contracts

Type and Location of Similar Work to Illustrate Work Quality

IBTS provides on-call plan review services to jurisdictions and developers across the nation. Examples of three such projects are provided in this section and demonstrate IBTS' work quality.

Project 1: Municipal Services for the City of Central, Louisiana, July 2011-Present

Central is Louisiana's 12th largest incorporated city and the newest. Located in the East Baton Rouge Parish, about 10 miles from downtown Baton Rouge, Central became an independent municipality in April 2005. It has approximately 30,000 residents living in a 66-square-mile area. The City has an annual operating budget of \$6 million and reserves of \$8 million.

For more than 10 years, IBTS has provided nearly all government services to the City of Central. These services include those the City of Tucson is seeking: full building department and code enforcement services, including permitting, plan review, and inspection services.

How Experience Relates to the Categories Outlined

- ***Similar to the Internal 2nd Party Plan Review services the City of Tucson is seeking***, on behalf of the City, IBTS performs all functions of a Community Development agency at the local level, including planning and zoning, building plan review, all building permits, inspections, and code enforcement services. IBTS oversees the planning and zoning process, including handling appeals and waivers as well as convening public meetings on a regular basis. IBTS also administers the building code regulatory process for housing construction and commercial building. IBTS also conducts inspections and enforcement processes by which property maintenance issues are identified and addressed to ensure the appeal of the community meets established standards.

Other Services IBTS Provides include:

- ***Capital Program Management***: IBTS convenes meetings with the City Council and the public to identify and vet capital improvement projects for the city. IBTS is also responsible to go out for bid on various capital improvement projects and then oversee projects initiated by the City.
- ***Nuisance Abatement***: IBTS amended the City's code enforcement procedures to utilize an Environmental Court dedicated to code enforcement cases. While voluntary compliance is always the goal, IBTS staff works closely with the City's hearing officer to verify all required steps are met



from initial complaint to adjudication. We track our progress with each case using a code enforcement software package to provide citizens and elected officials with up-to-date information.

- *Contract Management and Administration:* On behalf of the City, IBTS performs all facets of contract management and administration from product or service acquisition, through contract life cycle monitoring, and through to close out.
- *Communications and Public Relations:* IBTS provides full communications and public relations support including website maintenance for the City.
- *Financial Services:* IBTS performs tax revenue collection, reconciliation, and administration on behalf of the city.
- *Public Works Services:* IBTS maintains a core Public Works program including infrastructure maintenance (roads, bridges, common areas) for the City. Public Works also includes Disaster and Catastrophic Emergency response services.
- *Engineering and Stormwater Management Services:* IBTS provides engineering support services including flood plain management, storm water management and ground water permitting services.

IBTS offered disaster recovery support to the City as a result of a record flooding event that occurred in August 2016. The incessant rain isolated the town from surrounding jurisdictions, knocked out power disabling communications, and revealed several vulnerabilities such as lack of procedures and homeowners' insurance. Flood conditions made 2,000 City homes unsafe and required City residents to move to temporary shelters.

When the rains finally stopped, and damages were estimated to be in the billions, IBTS and the City set to work to maximize funding opportunities. IBTS' prior experience with disaster funders' regulations and requirements meant that they were able to alert residents, early on, of the most frequent missteps and points of confusion that can reduce or even eliminate FEMA assistance and National Flood Insurance Program claims. Such specific requirements included what constitutes substantial damage, base flood elevation guidelines and accessing manufactured housing units; these were areas where IBTS guided the City because of its prior disaster recovery experience.

Post-disaster, IBTS connected the City with professionals to conduct real-time flood mapping, assisted in the establishment of a market value policy for homes and facilitated the documentation of volunteer hours to meet FEMA's cost share requirement so that the City received as much federal aid as possible.

Project 2: Compliance Plan Reviews and Construction Services for the Maryland Stadium Authority (MSA), Baltimore, Maryland, July 2015-Present



Figure 3: Patterson High School & Claremont Middle/High School, Baltimore (new construction). IBTS is providing all code compliance reviews and building code inspections for 28 Baltimore City public schools totaling 3 million square feet.

The Maryland Stadium Authority (MSA) selected IBTS to provide all compliance plan reviews and construction inspections for the design and construction of 28 Baltimore City public schools being built or substantially renovated, a \$1.1 billion project. IBTS is working closely with multiple stakeholders including the Maryland Stadium Authority (Authority Having Jurisdiction), Baltimore City Schools (Owner/Operator), the Maryland State Fire Marshal's Office (responsible for life safety), and numerous design teams, consultants, construction and program/project managers.

How Experience Relates to the Categories Outlined

- **Similar to the Internal 2nd Party Plan Review services the City of Tucson is seeking, IBTS is providing:**
 - Monthly reporting on project progress, anticipated deliverables, and risks/recommendations
 - Reviewing design documents (construction drawings, shop drawings, and specifications) and performing all code inspections for:
 - Structural and non-structural Architectural/Building, including Accessibility
 - Electrical, Mechanical/HVAC/Energy, Plumbing
 - Fire and life safety (in coordination with the Maryland State Fire Marshal's Office)
 - Performing all code compliance reviews and building code inspections
 - Reviewing building code modification applications from designers on behalf of MSA and making recommendations to building official at MSA on the approval or rejection of these applications
 - Evaluating the new products and alternative approach or systems used in school construction on behalf of MSA
 - Issuing final inspection reports stating that facility is in compliance with all applicable local, state and federal building codes and standards

Working in conjunction with reviews and inspections by the Maryland State Fire Marshal's office, IBTS ensures that each school has been designed and built in compliance with applicable building codes and standards, so that each school is safe to occupy and operate.

IBTS reviewed more than 2,500 design pages and performed more than 1,000 inspections, all on schedule and without delay during the 5+ year total construction schedule. Over five years, IBTS adjusted staffing levels as appropriate, ensuring that it performed all reviews within 10 business days, and all inspections within 24 hours (typically) to 48 hours of requests. In doing so, IBTS minimized risks to the project schedule, while ensuring prompt and professional reviews and inspections, minimizing risks associated with potential rework or project safety due to failure to comply with applicable codes, standards, and acceptable engineering practice.

Project 3: Inspection Services for the Metropolitan Washington Airport Authority, 2009-Present

Figure 4. Dulles Corridor Metrorail Silver Line Extension, Phase 2. Throughout Phase I and now into Phase II, IBTS continues to support the Virginia Department of General Services and Metropolitan Washington Airports Authority with thousands of code compliance inspections, making mass transit a viable alternative for hundreds of thousands of residents in the DC Metro area.

For a two-phase, multi-billion, multi-train station construction project, IBTS provided: 1) program management and reporting; 2) scheduling coordination and inspection; 3) staffing; 4) notification; and 5) final documentation. IBTS developed and implemented a tool that identifies compliance issues and reduces the end-of-project “punch list” from thousands to a few known and manageable items, ensuring on-time project completion. Throughout the project, IBTS provided its clients with on-demand, on-time-every-time plan review, project monitoring, and inspections.

The Washington D.C. Metrorail is the second busiest rail transit network in the United States, with an average weekday rail ridership of 713,000 passengers. Serving a population of roughly 4 million, it’s been one of the most efficient public transportation systems in the country for decades. Keeping the system running at optimal efficiency with the utmost passenger safety—while also expanding service to more areas—is a big undertaking. When the Commonwealth of Virginia Department of General Services (DGS) looked to expand the Metrorail into the suburbs of Northern Virginia, they called IBTS to ensure quality and safety during this \$6.8 billion, 10-year-long project.

How Experience Relates to the Categories Outlined

- ***Similar to the Internal 2nd Party Inspection services the City of Tucson is seeking, IBTS provided:***
 - In Phase 1: Inspections and oversight for the Virginia Department of General Services (DGS)
 - In Phase 2: Plan review and inspections services for both DGS and the Metropolitan Washington Airports Authority (MWAA). Over 10 years, IBTS performed thousands of code compliance inspections without delaying construction. Throughout both phases, IBTS has provided its clients with on-demand, on-time-every-time plan reviews, project monitoring, and inspections.

IBTS provided 24/7/365 oversight and inspections as needed due to the complexity of this project to ensure quality, code compliance, and safety, including monitoring and reporting on performance of Special Inspections contractors. IBTS helped interpret codes and bridge the gap between the jurisdictions and stakeholders.

For MWAA, IBTS provides structural code and environmental reviews, and code compliance and quality assurance inspections for all construction and systems for the six train stations in the 11.4-mile extension from the eastern edge of Reston, VA, west to and through Washington Dulles International Airport, and to Ashburn, VA, in eastern Loudoun County. IBTS responsibilities include: 1) program management and reporting; 2) scheduling coordination and inspection; 3) staffing; 4) notification; and 5) final documentation. To support our clients, IBTS developed and implemented a tool that provides actionable, 7-day and 30-day reports that identify compliance issues or potential issues to be addressed in a timely manner, escalating items when necessary. The intent of the reports is to reduce the end-of-project “punch list” from thousands to a few known and manageable items, ensuring on-time project completion.

References

Project 1: Municipal Services for the City of Central, Louisiana

POC Name, Title, Organization, Phone, Email	David Barrow, Mayor City of Central, LA (225) 246-2306 david.barrow@central-la.gov
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Project 2: Compliance Plan Reviews and Construction Services for the Maryland Stadium Authority (MSA), Baltimore, Maryland

POC Name, Title,	Dawn Sanders
Organization, Phone,	PM, Maryland Stadium Authority (MSA)
Email	(o) 410-223-4135 /(c) 443-392-5689 DSanders@mdstad.com

Project 3: Inspection Services for the Metropolitan Washington Airport Authority

POC Name, Title,	John Kearney, Project Manager/Construction Manager
Organization, Phone,	1 Aviation Circle, Ste. 154, Washington, DC 20001
Email	(703) 894-7611 John.Kearney@DullesMetro.com

Appendix A: Key Staff Resumes



David Groves, PE
Project Director, Plan Reviewer**PROFESSIONAL EXPERIENCE**

Mr. Groves has 22 years of professional experience, including 14 years as a Plan Reviewer for Maricopa County, Mesa, and Scottsdale, Arizona. He utilizes his extensive knowledge of International Codes and National Fire Protection Association standards while designing and reviewing fire protection and alarm systems. He is an expert in municipal plan submittal, review, and approval processes. He is an Owner's Quality Control Representative for large-scale commercial/industrial construction projects. He is a licensed Fire Protection Engineer and a licensed Architectural Engineer.

2016 – Present // Fire Protection Engineer, IBTS

- Performs compliance assessments and audits to ensure construction complies with applicable codes, standards, approved designs, and specifications.
- Supports IBTS's other programs and clients, including HUD and FEMA, by developing and delivering training on design, installation, and inspection of fire protection systems.

2013 – 2016 // Quality Control Representative, Watchtower

- Performed field inspections of large-scale commercial projects for compliance with owner specifications and adopted codes.
- Reviewed construction documents.
- Attended weekly contractor progress meetings.

2005 – 2013 // Senior Fire Plan Reviewer, City of Scottsdale, AR

- Managed the fire plan review division.
- Responsible for the review of commercial and residential fire protection systems and verifying proper construction type, egress, and life safety systems.
- Reviewed requests for performance-based engineering designs.
- Provided regulatory design guidance for architects and engineers.

2003 – 2005 // Senior City Plans Examiner, City of Mesa, AR

- Reviewed commercial and residential fire protection systems.
- Verified proper construction type, egress, and life safety systems.
- Reviewed requests for performance-based engineering designs.
- Provided regulatory design guidance for architects and engineers.

2002 – 2013 // Project Manager/Permit Coordinator, Arizona Building Committee

- Managed project design and plan submittals for mid-sized assembly occupancies throughout Maricopa County.
- Designed fire sprinkler and alarm systems using AutoCAD and hydraulic calculation software.

2002 – 2003 // City Plans Examiner, City of Mesa, AR

- Reviewed commercial and residential construction documents and fire protection systems.

1999 – 2002 // Building Inspector I/II, City of Mesa, AR

- Performed field inspections of large-scale commercial occupancies for both building and fire codes.

PERTINENT EXPERIENCE

- High profile projects include ongoing work at the Metropolitan Washington Airports Authority and Virginia Commonwealth University Health System's new Children's Hospital and Adult Outpatient Facility.
- Very proficient with the BlueStream tool for all plan review projects.
- Knowledgeable of AZ and ICC codes.

CERTIFICATIONS

- Licensed Fire Protection Engineer
- Licensed Architectural Engineer (Lic Number 0402057695)

ICC Certifications:

- Building Official
- Certified Fire Marshal
- Master Code Professional
- Building Plans Examiner
- Electrical Plans Examiner
- Fire Plans Examiner
- Mechanical Plans Examiner
- Plumbing Plans Examiner
- Combination Inspector
- Building Inspector
- Electrical Inspector
- Fire Inspector II
- Mechanical Inspector
- Plumbing Inspector
- Accessibility Inspector/Plans Examiner
- Residential Energy Inspector/Plans Examiner

David Wei Lu, RA, EIT, CBO, MCP Plan Review Manager

PROFESSIONAL EXPERIENCE

Mr. Lu is a registered Architect, with a Master's in Structural Engineering and an EIT certification. He is an ICC Certified Building Official, Master Code Professional, and Combination Commercial and Residential Inspector and Plans Examiner. He has 32 years of professional experience in the building and infrastructure construction industry with extensive knowledge of both residential and commercial architectural and structural design. His experience includes 15 years of performing multi-discipline plan reviews in accordance with building codes as adopted and amended by various jurisdictions. He is experienced in using AutoCAD, ArchT for 3D Modeling, MicroStation, STAADIII, Accurender for 3D Rendering, and Adobe Photoshop.

2006 – Present // Manager of Plan Review Services, IBTS

- Oversees plan review services for residential, commercial, institutional, and industrial projects in jurisdictions throughout the United States, including Virginia; Pennsylvania; Washington, D.C.; Maryland; Oklahoma; and California.
- Performs building, fire protection, mechanical, plumbing, electrical, green, and energy conservation reviews as well as structural and accessibility reviews in accordance with adopted building codes of the various jurisdictions.
- Provides technical and administrative support for IBTS code enforcement training programs.

2000 – 2006 // Project Manager, Pinnacle Design and Consulting

- Supervised others completing residential and commercial projects.
- Responsible for 100% design and design development, preparing construction documents, coordinating PEM work, construction administration, reviewing shop drawings, and holding meetings with clients.
- Worked on both residential (single-family homes, town homes, duplexes, condos, apartments) and commercial (clubhouses, restaurants, tenant suite buildouts, gymnasiums, private schools) projects.

1998 – 2000 // Architectural Coordinator, Pulte Homes Corp.

- Prepared construction documents, coordinated with others to complete various residential projects and answered field questions from Pulte subdivisions in VA, DC, MD, PA, DE, RI, MA, and NJ. Project types included detached and attached homes, condos, and clubhouses.

1997 – 1998 // Intern Architect, Nicholas Dickson and Associates, P.C.

- Performed architectural programming, schematic design, design development, working drawings, detailing, and construction documents.
- Responsible for reviewing shop drawings, coordinating with consulting engineers, managing project files, answering field RFI, performing computer 3D modeling and architectural illustration, assembling a company marking portfolio, and establishing a company construction detail library.

1990 – 1991 // Intern, Jilin Provincial Architectural Design Institute

- Responsible for site surveying and planning, conceptual architectural and structural design, design development, work drawings, detailing, construction document, and coordination in inspecting construction and providing field reports.

PERTINENT EXPERIENCE

- Manages large and complex plan review projects, including Virginia Commonwealth University Health System's new Children's Hospital and Adult Outpatient Facility; Phlow Corp. capital projects;



Mercedes-Benz Superdome renovations in New Orleans; Baltimore County schools’ additions and renovations on behalf of the Maryland Stadium Authority; and military housing development in Army, Navy and Air Force bases across the nation.

- City of Alexandria, VA recent work includes 2395 Mill Rd., Town Center Volume 4 West Tower and 2000 N. Beaugard St.
- Very proficient using the BlueStream tool.
- Knowledgeable of VA and ICC codes.

EDUCATION

- Doctoral Studies, Structural Engineering, North Carolina State University
- Master’s in Structural Engineering, University of Maine
- Studies in Fine Arts, The College of Saint Rose
- Bachelor’s in Architecture, Zhejiang University

CERTIFICATIONS

- Licensed Architect
- Registered Engineer in Training (EIT)
- IDP Certificate from NCARB
- County of Fairfax – DPW & E – Expedited Plan Review Program – Residential and Commercial

ICC Certifications:

Master Code Professional

Certified Building Official

Accessibility Inspector/Plans Examiner

Certified Building Code Official

Certified Electrical Code Official

Certified Mechanical Code Official

Certified Plumbing Code Official

Combination Inspector

Combination Plans Examiner

Commercial Building Inspector

Commercial Combination Inspector

Commercial Electrical Inspector

Commercial Energy Inspector

Commercial Energy Plans Examiner

Commercial Mechanical Inspector

Commercial Plumbing Inspector

Electrical Inspector

Certified Green Plans Examiner/Inspector

Electrical Plans Examiner

Mechanical Inspector

Mechanical Plans Examiner

Plumbing Inspector

Plumbing Plans Examiner

Residential Building Inspector

Residential Combination Inspector

Residential Electrical Inspector

Residential Energy Inspector/Plans Examiner

Residential Mechanical Inspector

Residential Plans Examiner

Residential Plumbing Inspector

Green Building – Residential Examiner



Appendix B: OMNIA National Contract Response

3.1 Company

A. Brief history and description of Consultant to include experience providing similar products and services.

IBTS is a nonprofit organization with a decades long track record working at the intersection of public service and commerce by combining public-sector credibility with private-sector innovation. We provide a full range of building department, plan review, and inspection services for clients ranging from the largest, most sophisticated municipalities such as Baltimore, MD, and Washington, D.C., to the smallest rural towns and counties across the Midwest. Our versatility is shown by our work ranging from mixed-use, urban-infill projects and tens of thousands of homes on military bases to schools, hospitals, and one of the largest infrastructure projects in the U.S., the Washington, DC, Metrorail. IBTS has approximately 200 employees, primarily code professionals, with about half living and working in Maryland, Virginia, and DC, with the balance working remotely from locations across the country and abroad as well as approximately 100 field consultants.

Incorporated in the Commonwealth of Virginia, IBTS was founded in 1974 and organized in its current structure in 1998. The organization is headquartered in Ashburn, Virginia. We have offices in eleven locations, including Ashburn (Headquarters) and Richmond, VA; Albany and Hudson Valley, NY; Bossier City and City of Central, LA; Kansas City, MO; Omaha, NE; Oklahoma City, OK; Washington, DC; and San Juan, PR.

IBTS CEO Ashok Goswami is the principal officer. He is assisted by Chief Development Officer Chris Fennell. CEO Goswami has more than 40 years of service with the organization, and Chief Development Officer Fennell has a total of approximately 20 years with IBTS, which includes direct employment and consulting. IBTS maintains stable, longstanding leadership with many years of experience providing the services we are proposing to provide to communities through OMNIA® Partners. A dedicated and highly qualified team of Program Directors, Project Managers, and program experts oversee functional business areas.

IBTS' work is guided by a Board of Directors consisting of government officials appointed by five of the most highly respected, grassroots, state and local governmental associations. The Board-appointing associations include the National Governors Association Center for Best Practices (NGA), the Council of State Governments (CSG), the National Association of Counties (NACo), the National League of Cities (NLC), and the International City/County Management Association (ICMA). These associations assist in carrying out collaborative projects connecting the IBTS mission and capability to constituent needs and interests of our stakeholders throughout the nation.



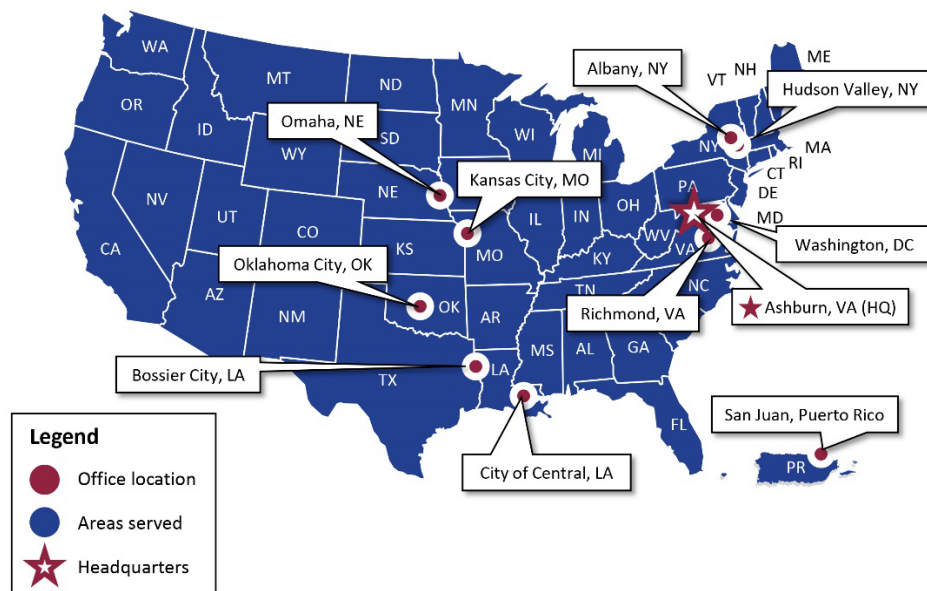
IBTS Board-Appointing Associations. The IBTS Board assists in connecting the IBTS mission and capability to local governments across the nation.

B. Total number and location of salespersons, business development people, and/or project managers employed by Consultant.

IBTS utilizes a seller-doer model for business development. As such, we do not employ sales people in the traditional sense because our project managers act in a dual capacity for both sales and delivery. This approach has been adopted by IBTS to ensure the services offered during the sales cycle match those provided once the contract is awarded. This has an added benefit of increasing accountability through the sales cycle. Currently IBTS has over 20 project managers and Directors engaged in sales and delivery.

C. Number and location of support centers (if applicable) and location of corporate office.

IBTS has eleven offices in the following locations: Ashburn (Headquarters) and Richmond, VA; Albany and Hudson Valley, NY; Bossier City and City of Central, LA; Kansas City, MO; Omaha, NE; Oklahoma City, OK; Washington, DC; and San Juan, PR. Many of approximately 200 employees and 100 field consultants work remotely due to the nature of the services they provide, and we anticipate this to continue on this contract. Our current footprint is shown in the map below:



IBTS' National Coverage. IBTS is currently serving all 50 states and the US territories.

D. Annual total company sales for the three previous fiscal years. The intent of this is to understand the company's full size and/or capacity so the number does not need to be exact and should be general in nature.

Fiscal Year	Annual Sales
2019	\$47,000,000
2020	\$35,000,000
2021	\$36,000,000

a. Submit FEIN and Dunn & Bradstreet report.

IBTS FEIN is 54-1963889

IBTS consistently maintains excellent Dun & Bradstreet ratings. Our quarterly report, excerpted in Appendix C, presents a snapshot of our financial strength. For example, IBTS' D&B Rating, a proprietary indicator that assesses a company's size and composite credit appraisal is 1, indicating very low risk and the best score possible. Likewise, our prompt payment indicators and business viability ratings are all indicative of a healthy, well managed, and reliable financial status.

E. Describe any green or environmental initiatives or policies.

Many of IBTS' programs focus directly on green or environmental issues. For example, we have had a direct positive impact on the built environment through delivery of hundreds of green building assessments via the National Green Building Standard and thousands of energy efficiency ratings via the EPA EnergyStar program in addition to ongoing energy code plan review and inspection compliance. We also have multiple LEED AP's on staff.

IBTS is the largest renewable energy and storage quality assurance provider in the U.S. We have completed more than 70,000 installation verifications across all 50 states and U.S. territories.

We are currently supporting a network of nonprofit organizations to develop tools and provide technical support to address climate change induced risks (e.g. sea level rise) that threaten affordable multifamily housing in Miami, Orlando, and Tampa, Florida.

F. Describe any diversity programs or partners Consultant does business with and how Participating Agencies may use diverse partners through the Master Agreement. Indicate how, if at all, pricing changes when using the diversity program. If there are any diversity programs, provide a list of diversity alliances and a copy of their certifications.

IBTS is completing a diversity, equity, and inclusion assessment program through funding provided by the Kresge Foundation. We developed an assessment platform to identify impacts of climate change on the resilience of vulnerable communities in major metropolitan cities across the U.S. We then piloted the assessment tools with Orlando, FL, Santa Fe, NM, and San Leandro, CA.

We are proud of incorporating Section 3 and MWBE plans in our federally-funded programs for many years. We have relationships with a broad array of partners including DBE's, 8A's, WOSB, MWBE, SDVOSB, and Section 3 business enterprises that would be available to participate in the Master Agreement if and as appropriate. Partner pricing is based on market rates reflected in our proposed fee schedule and would not necessarily change based on DEI status.

G. Indicate if Consultant holds any of the below certifications in any classified areas and include proof of such certification in the response:

a. Minority Women Business Enterprise

Yes **No**

If yes, list certifying agency: _____



- b. Small Business Enterprise (SBE) or Disadvantaged Business Enterprise (DBE)

Yes No

If yes, list certifying agency: _____

- c. Historically Underutilized Business (HUB)

Yes No

If yes, list certifying agency: _____

- d. Historically Underutilized Business Zone Enterprise (HUBZone)

Yes No

If yes, list certifying agency: _____

- e. Other recognized diversity certificate holder

Yes No

If yes, list certifying agency: _____

IBTS does not hold any of these certifications; however, when required, we team with subcontractors and partners to meet project goals and task requirements.

- H. List any relationships with subcontractors or affiliates intended to be used when providing services and identify if subcontractors meet minority-owned standards. If any, list which certifications subcontractors hold and certifying agency.

Although not currently envisioned with this procurement, IBTS has a history of utilizing Section 3 and MWBE subcontractors in our federally-funded programs. We have relationships with a broad array of partners including DBE's, 8A's, WOSB, MWBE, SDVOSB, and Section 3 business enterprises that would be available to participate in the Master Services Agreement.

- I. Describe how Consultant differentiates itself from its competitors.

IBTS has served as a trusted advisor and partner to local, state, and federal government clients for decades, differentiating ourselves from our competitors with our nonprofit commitment to ensuring the success of communities nationally. Our Board includes a representative from each of the five major nonpartisan, nonprofit organizations that serve U.S. state and local government officials, including the Council of State Governments (CSG), the International City/County Management Association (ICMA), the National Association of Counties (NACo), the National Governors Association (NGA), and the National League of Cities (NLC). This unique structure allows IBTS to ensure our work is guided by and aligned with public sector needs. IBTS' staff includes experts in building code expertise; inspections and plan review; federal grants management; disaster planning, mitigation, and recovery; municipal services; governance and regulatory assessments; energy and renewables; solar quality assurance; and resilience services.

J. Describe any present or past litigation, bankruptcy or reorganization involving Consultant.

IBTS has never been in bankruptcy or gone through a reorganization. Currently and in the past, as any company, IBTS has been involved in claims relative to our size and the nature of our services: workers compensation, auto liability, payment (as claimant only) and employee matters. All defensive claims have been covered by insurance with most resolved in our favor and no claims have been material.

K. Felony Conviction Notice: Indicate if the Consultant

- a. is a publicly held corporation and this reporting requirement is not applicable;
- b. is not owned or operated by anyone who has been convicted of a felony; or**
- c. is owned or operated by and individual(s) who has been convicted of a felony and provide the names and convictions.

The answer is b. IBTS is not owned or operated by anyone who has been convicted of a felony.

L. Describe any debarment or suspension actions taken against Consultant

There have been no debarment or suspension actions taken against IBTS.

3.2 Distribution, Logistics

A. Each offeror awarded an item under this solicitation may offer their complete service and product offering (also referred to as a balance of line). Describe the full line of services and/or products offered by Consultant. Pricing shouldn't be included at this time but will be requested later during negotiations.

IBTS is a nonprofit (501(c)(3)) organization built on government partnerships with the goal of helping communities meet governance challenges while enhancing public safety, economic development, and improving quality of life.

Our public-service, non-profit mission has been consistent from the start: we exist to bring technical and regulatory expertise to bear in a non-biased, third-party, practical, and applied manner to help address the challenges of governance for the public good.

Our services include:

- ▶ Building Department Services (permitting, plan review, inspection, fee collection)
- ▶ Energy & Sustainability
- ▶ Governance & Regulatory Assessments
- ▶ Market Research & Community Engagement
- ▶ Natural Disaster Mitigation & Recovery
- ▶ HUD-Manufactured Home Monitoring and Inspection
- ▶ Resilience Assessment & Planning
- ▶ Grant Writing

Institute for Building Technology and Safety (IBTS)

OMNIA National Contract Response

Building Department Services: IBTS provides on-demand surge and just-in-time building code professionals, including engineers, plans examiners, inspectors, permit technicians, and administrative support personnel. Our clients range from the largest, most sophisticated municipalities such as Washington, D.C., to the smallest rural towns and counties across the US. Our versatility is shown by our work ranging from mixed-use, urban-infill projects and tens of thousands of homes on military bases to the schools, hospitals, and one of the largest infrastructure projects in the U.S., the Washington, DC, Metrorail. Our services include community development, building department services, facilities services, custom permitting and inspection solutions, energy and sustainability services, quality assurance, compliance, and risk monitoring. Services include:

- ▶ Building Department start-up, operation, and assessment
- ▶ Plan review and inspection –Residential, Commercial, Industrial, Design/Built, National/International
- ▶ Architectural (structural and nonstructural)
- ▶ Fire protection, energy conservation, and code enforcement
- ▶ Accessibility, consultation, and compliance audits
- ▶ Electrical, mechanical, and plumbing
- ▶ Public outreach, training, and continuing education provider (IACET and AIA Certified)
- ▶ Building code consultations and constructability audit
- ▶ Property maintenance and Housing Quality Survey (HQS) inspections
- ▶ Certifications include ICC Master Code Professionals and Certified Building Officials, Professional Engineers, and Registered Architects, LEED® and Green Building certified staff

Energy & Sustainability: IBTS enables the implementation of sound, cost-effective energy management and investment practices to enhance the nation’s energy security and environmental stewardship – for federal, state, and local government clients. For example, we understand the benefits and challenges posed by Executive Orders such as E.O. 13423, which required federal agencies to reduce energy consumption by 3% each year, leading to 30% by the end of 2015.

We’ve helped our clients meet compliance directives like these in a cost-efficient manner while enhancing the workplace environment by leveraging IBTS industry and policy knowledge. By considering both the operations and maintenance aspects of O&M best practices, IBTS makes possible innovative solutions that meet both energy and cost efficiency requirements. Services include:

- ▶ Energy efficiency program management
- ▶ Solar quality management (served as the Department of Energy compliance monitoring provider on over 30,000 weatherized residences across the country)
- ▶ Facility baselining and planning
- ▶ Financing options for energy projects
- ▶ Energy audits
- ▶ Building commissioning
- ▶ Energy code compliance
- ▶ Life cycle cost analysis
- ▶ Demand side management and utility rebate services
- ▶ Monitoring verification and evaluation (MVE)
- ▶ Independent verification and validation (IVV)
- ▶ Remote and online facilities performance monitoring and diagnostics

Governance and Regulatory Assessments: IBTS has a deep understanding of regulatory capacity acquired by providing regulatory services in the built environment in dozens of municipalities. We don’t



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OMNIA National Contract Response

just understand building regulatory concepts in theory. We put them into practice every day with public safety responsibility at stake. Toward that end we have established rigorous assessment methodologies that incorporate both state-of-the-art quality assurance principles and active engagement with stakeholders to identify process and knowledge gaps beyond the obvious.

Market Research & Community Engagement: Our Market Research and Marketing team leverages a unique approach that combines data-based strategies, domain expertise in building codes, a proven track record of reaching and engaging a wealth of stakeholders and members of the public (including vulnerable and hard-to-reach populations), and decades of experience working with jurisdictions of all sizes. The team uniquely combines the expertise of analysts who provide market research services through BuildingInsight, LLC, IBTS' wholly owned market research firm; our communications, marketing, and outreach experts; and our technical subject matter experts.

Natural Disaster Mitigation & Recovery: Nowhere is the IBTS philosophy more clearly defined than in our experience and commitment to disaster management. Hurricanes Rita, Katrina, Sandy, Matthew, Harvey, and Irma have provided IBTS with deep roots in national, state, and local communities meeting the needs of citizens recovering from disaster. We have managed billions of dollars in CDBG-DR funding and are intimately familiar with the requirements for managing and reporting on such funds. Through our experience helping communities across the U.S. prepare for and recover from natural disasters, we have learned how challenging it can be to shift community culture and integrate resilience into disaster and strategic planning.

HUD-Manufactured Home Monitoring and Inspection

IBTS has been the sole third-party monitoring agent for HUD's national manufactured housing program since the program's inception in 1976. In this role, IBTS is responsible for the monitoring, oversight, and annual assessment of the quality systems, procedures, and capacity of manufacturers and third-party agencies to implement HUD's national regulatory program.

IBTS provides annual assessments on the performance of quality assurance systems implemented by six Design Approval Primary Inspection Agencies (DAPIAs), 14 In-Plant Production Primary Inspection Agencies (IPIAs), and 37 State Administrative Agencies (SAAs). On behalf of HUD, IBTS ensures that the quality systems used by these monitoring agencies are compliant with the Federal Manufactured Home Construction Safety Standards and Regulations.

IBTS program innovations include:

- ▶ Tracking and reporting of approximately \$200 million in label fee collections
- ▶ Searching and retrieval of thousands of inspection and quality audit reports
- ▶ Maintenance, searching and retrieval of a design library containing more than 3 million designs spanning 34 years
- ▶ Creating a searchable text database of regulatory interpretations and opinions issued by HUD since 1976

HUD relies on IBTS to provide quality assurance technical training to project stakeholders to improve industry compliance with the federal regulations.

Resilience & Planning: IBTS has been working to advance our nations' resilience for many years. We have developed practical tools including the Community Resilience Assessment Framework & Tools (CRAFT) in conjunction with the National League of Cities to help small- and medium-size communities identify, prioritize, and address resilience needs in their communities across the economic, social, governance, and physical spectrum.



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Climate change is the driving force behind a variety of business continuity, economic, and reputation risks for business. We specialize in assessing the climate risks to our clients' facilities and operations, providing resiliency strategies to support their success and ability to thrive in the face of direct and indirect business impacts from climate change.

Notable IBTS' resilience and planning tools:

- ▶ **IBTS OnHAND:** The IBTS Online Help and Advice for Natural Disasters (IBTSOnHAND.org) website is free, web-based, interactive resource that provides practical, actionable natural disaster planning, response, and recovery information for use by a range of stakeholders at the local, state, and national level.
- ▶ **CRAFT Equitable Climate Resilience (ECR) Tool:** IBTS adapted its CRAFT tool to help communities better understand their progress on social equity and climate resilience and ways to improve.

Grant Writing: *Grant Research.* IBTS can develop tailored research for communities that would like assistance identifying funding opportunities and aligning them with local needs. We have access to multiple databases of federal, state, corporate, and private foundation grant opportunities targeted at municipalities, counties, local government agencies, and nonprofit organizations. We perform searches through thousands of grants, using terms aligned to topics in which a community has an interest - such as public works, recreation, economic development, etc. We can set alerts on opportunities of interest so when/if a change occurs, we can track the updates and notify communities.

Grant Writing Support. Our team can help communities develop their grant applications. Services include:

- ▶ Program/project conceptualization
- ▶ Writing/editing grant narrative
- ▶ Ensuring compliance with grant requirements
- ▶ Collaboration with internal and external stakeholders and agencies
- ▶ Assisting with document submission

Grant Management and Administration. As a nonprofit organization, IBTS can serve as either the grant program manager or a subrecipient of grant funds. We offer grant management and compliance support to optimize program implementation and ensure efficient and effective utilization of grant funds. We can assist with coordination of internal departments, external agencies, and grant issuing entities to meet documentation and disbursement requirements.

B. Describe how Consultant proposes to distribute the products/services locally, regionally, or nationwide (depending on the Consultant's capacity). Identify all states where services and/or products will and will not be offered under the Master Agreement, including U.S. Territories and Outlying Areas.

IBTS provides professional services throughout the United States and U.S. Territories. We intend to continue doing so through the Master Agreement.

With eleven offices and many staff located across the country, IBTS is ready to serve the OMNIA® Partners participating public entities. The proposed work will be led by Chris Miller, AICP, Director of IBTS' Local Government Services Division. We have identified points of contact elsewhere in this proposal that will respond to inquiries and engage the most appropriate local, regional, or remote personnel to provide the relevant services to participating public entities. We will leverage our extensive subcontractor network to address any coverage gaps and provide a seamless experience.



- C. Describe how Consultant shall match their Master Agreement offering to other Participating Agencies so Participating Agencies can ensure compliance with the Master Agreement and maintain records to auditable standards.

IBTS will work closely with participating agencies to ensure all terms and conditions of the master agreement are included in any resulting contract. As needed, our project manager will compile reports comparing not only terms and conditions but also our internal record keeping process to ensure timely reports are provided to OMNIA Partners.

- D. Identify all other companies (subcontractors or otherwise) that may be involved in the services and/or products being offered to end users.

IBTS does not intend to utilize subcontractors as part of our service delivery plan for the associated master contract.

- E. Provide the number, size and location of Consultant's operations including where various building locations are.

IBTS has eleven offices in the following locations: Ashburn (Headquarters) and Richmond, VA; Albany and Hudson Valley, NY; Bossier City and City of Central, LA; Kansas City, MO; Omaha, NE; Oklahoma City, OK; Washington, DC; and San Juan, PR. Many of approximately 200 employees and 100 field consultants work remotely due to the nature of the services they provide, and we anticipate this to continue on this contract.

3.3 Marketing, Outreach, and/or Sales

- A. Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to immediately implement the Master Agreement as Consultant's primary go to market strategy for Public Agencies to Consultant's teams nationwide, to include, but not limited to:

- i. Executive leadership endorsement and sponsorship of the award as the public sector go-to-market strategy within first 10 days

IBTS' Executive Officers and Directors are aware of the award opportunity and are prepared to endorse it as our public-sector go-to-market strategy to all staff engaged with public-sector business development efforts nationally.

- ii. Training and education of Consultant's local, regional, and/or national staff, and if applicable, sales force, with participation from the Consultant's executive leadership, along with the OMNIA Partners team within first 90 days

IBTS will begin training our staff engaged in public-sector business development efforts within the first 21 days of the award. We will engage with OMNIA Partners' team within the first seven days of the award to determine training logistics, and begin working on presentations, collateral, and other materials needed to support the training. We will use IBTS' SharePoint sites to store these materials,

ensuring that all pertinent staff can easily access them. We will conduct training using in-person and virtual meetings. Both Executive Leadership and Directors will participate in these sessions.

- B. Provide a detailed ninety-day plan beginning from award date of the Master Agreement describing the strategy to market the Master Agreement to current Participating Public Agencies, existing Public Agency customers of Consultant, as well as to prospective Public Agencies nationwide immediately upon award, to include, but not limited to:
- i. Creation and distribution of a co-branded press release to trade publications
 - ii. Announcement, Master Agreement details and contact information published on the Consultant's website within first 90 days
 - iii. Design, publication and distribution of co-branded marketing materials within first 90 days
 - iv. Commitment to attendance and participation with OMNIA Partners at national (i.e. NIGP Annual Forum, NPI Conference, etc.), regional (i.e. Regional NIGP Chapter Meetings, Regional Cooperative Summits, etc.) and Consultant-specific trade shows, conferences and meetings throughout the term of the Master Agreement
 - v. Commitment to attend, exhibit and participate at the NIGP Annual Forum in an area reserved by OMNIA Partners for partner Consultants. Booth space will be purchased and staffed by Consultant. In addition, Consultant commits to provide reasonable assistance to the overall promotion and marketing efforts for the NIGP Annual Forum, as directed by OMNIA Partners.
 - vi. Design and publication of national and/or regional advertising in trade publications throughout the term of the Master Agreement
 - vii. Ongoing marketing and promotion of the Master Agreement throughout its term (case studies, collateral pieces, presentations, promotions, etc.)
 - viii. Dedicated OMNIA Partners internet web-based homepage on Consultant's website with:
 - OMNIA Partners standard logo;
 - Copy of original Request for Qualification;

- Copy of Master Agreement and amendments between Principal Procurement Agency and Consultant;
- Summary of Products and pricing;
- Marketing Materials
- Electronic link to OMNIA Partners' website including the online registration page;
- A dedicated toll-free number and email address for OMNIA Partners

IBTS' ninety-day marketing plan will ensure that the following activities are implemented:

- A co-branded press release announcing the award and distributed to trade publications using our press release distribution service (PRWeb), social media, and internal distribution lists.
- A webpage on www.ibts.org that includes:
 - Announcement and details about the Master Agreement and contact information
 - OMNIA Partners standard logo
 - A copy of original Request for Qualification
 - A copy of the Master Agreement and amendments between Principal Procurement Agency and Consultant
 - A summary of products and pricing
 - Marketing Materials, including a sell sheet
 - An electronic link to OMNIA Partners' website including the online registration page
 - Search engine optimization (SEO efforts) to ensure effectiveness of the webpage
- A dedicated toll-free number and email address for OMNIA Partners
- Development of collateral material, specifically a sell sheet and direct mail piece that will be distributed to our public and private sector contacts and to staff for distribution among their networks.
- A calendar of OMNIA Partners' national, regional, and consultant-specific events. This will include our commitment to exhibit at the national NIGP Annual Forum in August. The event calendar will include the dates of the events as well as deadlines for related efforts (such as internal planning meetings, exhibit purchase and booth shipping dates, pre-show promotion, etc.).
- Design and publication of advertising national and/or regional advertising in trade publications throughout the Master Agreement term. Initial efforts will include advertising to the public sector through the International City/County Management Association (ICMA), National League of Cities (NLC), and National Association of Counties (NACo) publications. All three organizations appoint a member to our Board of Directors; we will leverage these opportunities throughout the term.

C. Describe how Consultant will transition any existing Public Agency customers' accounts to the Master Agreement available locally, regionally, and/or

nationally through OMNIA Partners. Include a list of current cooperative contracts (regional and national) Consultant holds and describe how the Master Agreement will be positioned among the other cooperative agreements.

IBTS is a professional services provider that historically has responded to competitive solicitations issued by individual state or local government entities. We expect our relationship with these clients to continue on that basis in many cases. However, we will provide focused, customized communications with the entities to advise them of the availability and benefits of the OMNIA Partners Master Agreement as a procurement approach.

IBTS recently began participating in the Houston-Galveston Area Council (HGAC) Cooperative Purchasing Agreement. The focus of that effort is on disaster management and emergency management-related professional services as opposed to the building regulatory services that are the focus of the proposed relationship with OMNIA Partners.

D. Acknowledge Consultant agrees to provide its logo(s) to OMNIA Partners and agrees to provide permission for reproduction of such logo in marketing communications and promotions. Acknowledge that use of OMNIA Partners logo will require permission for reproduction, as well.

We acknowledge that IBTS agrees to provide our logo to OMNIA Partners and OMNIA has permission for reproduction of the logo in marketing communications and promotions. We acknowledge that use of the OMNIA Partners logo will require permission for reproduction as well.

E. Confirm Consultant will be proactive in direct sales of Consultant's services and/or goods to Public Agencies nationwide and the timely follow up to leads established by OMNIA Partners. All sales-type materials are to use the OMNIA Partners logo. At a minimum, the Consultant's business development and/or sales initiatives should communicate:

- i. Master Agreement was competitively solicited and publicly awarded by a Principal Procurement Agency
- ii. Best government pricing
- iii. No cost to participate
- iv. Non-exclusive

We confirm that IBTS will be proactive in direct sales of our services and/or goods to Public Agencies nationwide and that we will ensure timely follow-up to leads established by OMNIA Partners.

We confirm that all sales-type materials IBTS produces under the Master Agreement will use the OMNIA Partners logo.

We confirm that IBTS' sales and business development efforts will communicate that the Master Agreement was competitively solicited and publicly awarded by a Principal Procurement Agency,

includes the best government pricing, no cost to participate, and is non-exclusive. We will additionally meet regularly to improve and refine marketing and sales messages to communicate additional benefits.

F. Confirm Consultant will train its local, regional, or national team (such as any business development individuals or sales force) on the Master Agreement.

At a minimum, sales training should include:

- i. Key features of Master Agreement
- ii. Working knowledge of the solicitation process
- iii. Awareness of the range of Public Agencies that can utilize the Master Agreement through OMNIA Partners
- iv. Knowledge of benefits of the use of cooperative contracts

We confirm that IBTS will train our local, regional, or national business development and sales teams on the Master Agreement, and that this training will include key features of Master Agreement, working knowledge of the solicitation process, awareness of the range of Public Agencies that can utilize the Master Agreement through OMNIA Partners, and knowledge of benefits of the use of cooperative contracts.

G. Provide the name, title, email and phone number for the person(s), who will be responsible for:

- i. Executive Support – Chris Fennell, Chief Development Officer, cfennell@ibts.org, 703.851.4187
- ii. Marketing – Karen Johnson, Market Engagement Program Director, kjohnson@ibts.org, 530.318.5428
- iii. Business Development/Sales – Chris Fennell, Chief Development Officer, cfennell@ibts.org, 703.851.4187
- iv. Business Development/Sales Support – Chris Miller, Director Municipal Services, cmiller@ibts.org, 678.576.7352
- v. Financial Reporting – Chris Miller, Director Municipal Services, cmiller@ibts.org, 678.576.7352
- vi. Accounts Payable – Maurice Kessler, Chief Financial Officer, mkessler@ibts.org, 571.643.5434
- vii. Contracts – Joseph F. Balac, Jr., Esq., General Counsel, Director HR, Contracts & Risk Management, jbalach@ibts.org, 703.930.7229

H. Describe in detail how Consultant's local, regional, or national team is structured, including contact information for the highest-level executive in charge of the business development or sales team.

IBTS' national team is led by a Chief Development Officer who oversees business development and marketing. Directors head service divisions and are responsible for projects we provide across the country. Service divisions include Building Department Services, Municipal Services, Technology Services, Puerto Rico Region, and Federal Programs.

Chris Fennell, Chief Development Officer; 703.851.4187 (cell); cfennell@ibts.org

I. Explain in detail how the sales teams will work with the OMNIA Partners team to implement, grow and service the local, regional, or national program.

IBTS will assign Curt Skoog, IBTS' Local Government Services Development Lead, as Development Lead to the OMNIA Partners program. Mr. Skoog will coordinate all activities between IBTS and OMNIA Partners. In addition to being the point of contact, he will oversee implementation of the 90-day marketing plan included in section 3.3 A and B.

The Development Lead will work with OMNIA to create an ongoing sales and marketing plan starting with the introduction of IBTS services to existing OMNIA Partners. The ongoing plan would also include marketing the benefits of the program to other local governments.

Curt Skoog, Local Government Services Development Lead; 816.679.0608 (cell); cskoog@ibts.org

I. Explain in detail how Consultant will manage the overall local, regional, or national program throughout the term of the Master Agreement, including ongoing coordination of marketing, sales, and/or outreach efforts, timely new Participating Public Agency account set-up, timely contract administration, etc.

Development Lead Curt Skoog will coordinate internal resources to manage the program.

IBTS has a marketing team who are trained to provide informative, accurate and appealing outreach documents to develop marketing tools to help advance our customer approaches. They will ensure we invest the time and energy into marketing the OMNIA Partners program. The team is led by IBTS' Marketing Engagement Program Director (refer to Section I above). She will oversee all activities related to market analysis and marketing. She has more than 25 years of experience in designing, implementing, and managing complex, nuanced B2B and B2G market research and marketing programs.

IBTS' Marketing Analyst, Gabby Geraci, will conduct research activities and develop content to support the marketing plan. Ms. Geraci has 15 years of experience working in communications fields for the nonprofit and government sectors and has extensive experience as a researcher, writer, fundraiser, and designer, and English-Spanish translation and interpretation.

IBTS' Senior Graphics Designer, Marco Taylor, will provide graphic design for all digital and print marketing efforts. Mr. Taylor has 15 years of experience designing materials for marketing, public information, and community engagement campaigns.

IBTS's legal and accounting teams (refer to Section I above for key contacts) are experienced in negotiating contracts and setting up federal and local government accounts.

- J. State the amount of Consultant's Public Agency sales for the previous fiscal year. This should be a general number for all public agencies the Consultant services. The intent of this is to get an understanding of the Consultant's current reach in the public sector. Provide a list of Consultant's top 10 Public Agency customers with a key contact for each.

IBTS' consolidated total of public agency sales for the last fiscal year is approximately \$20.2 million. IBTS is not authorized to share our customer list.

- K. Describe Consultant's information systems capabilities and limitations regarding order management through receipt of payment, including description of multiple platforms that may be used for any of these functions.

IBTS tracks all requests made for plan review services using its Microsoft platform based internal proprietary system, which is used by IBTS staff to create and manage records for each request. Our application is integrated with our Deltek CostPoint financial software to automatically provide information on projects and clients. Once plan review services are completed, IBTS will create the appropriate invoices and log them in CostPoint for tracking. As payments are accepted for completed services, IBTS' accounting team updates and closes the appropriate invoice records and records are updated in our plan review application.

- L. Even though it is anticipated many Public Agencies will be able to utilize the Master Agreement without further formal solicitation, there may be circumstances where Public Agencies will issue their own solicitations but still desire to use a cooperative program. The following options are available when responding to a solicitation for Products covered under the Master Agreement.

- i. Respond with or at a minimum include the Master Agreement.
 1. If solicitation is for a Request for Qualification or a Request for Proposal where pricing is not part of the evaluation criteria, when Consultants enter into negotiations, they should respond with Master Agreement pricing or lower (if competitive conditions require it).
 2. When responding with the Master Agreement Contract Sales are reported to OMNIA Partners.

Detail Consultant's strategies under these options when responding to a solicitation.

When IBTS responds to a solicitation from a non-participating Public Agency we will describe the availability of the Master Agreement in our response. When negotiating pricing we will utilize Master Agreement pricing or lower depending on market and competitive conditions.

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Likewise, we will advise the Public Agency of the potential to establish an OMNIA Partnership that can then be used as an alternative to the solicitation now or in the future. Sales resulting from this approach will follow regular OMNIA sales reporting processes.

To ensure this approach is widely and regularly implemented, we will train our development, marketing, and proposal teams accordingly.



Appendix C: Dun & Bradstreet Report (for OMNIA Partners Exhibit A, Section 3.1-D.)

Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response



INSTITUTE FOR BUILDING TECHNOLOGY AND SAFETY - Full Company View

Saved by Randall Holubiczko | 03-29-2022

Summary

Order Reference: holubiczko@dnb.com | Report as of: 03-29-2022 | using Currency as USD

INSTITUTE FOR BUILDING TECHNOLOGY AND SAFETY

Tradestyle(s): IBTS

ACTIVE HEADQUARTERS

Address: 45207 Research Pl Ste 100, Ashburn, VA, 20147, UNITED STATES

Phone: (703) 481-2000

D-U-N-S: 07-011-0721

In Portfolio: No

Failure Score 99 (No change since last month)	Delinquency Score 94 (No change since last month)	Age of Business 25 years 1997 Year Started	Employees 275 80 (here)
----------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------------------------------

Company Profile		
D-U-N-S 07-011-0721 Legal Form Corporation (US) History Record Clear Ownership Not publicly traded	Mailing Address United States Telephone (703) 481-2000 Website www.ibts.org Present Control Succeeded 2002	Annual Sales US\$ 35,730,533 Employees 275 (80 here) Age (Year Started) 25 years (1997) Named Principal Ashok Goswami, CEO Line of Business Management consulting services

Risk Assessment	
Overall Business Risk	Maximum Credit Recommendation



LOW

LOW-MODERATE

MODERATE

MODERATE-HIGH

HIGH

US\$ 609,000

The recommended limit is based on a low probability of severe delinquency.

Dun & Bradstreet Thinks...

- Overall assessment of this organization over the next 12 months: **VERY STABLE CONDITION**
- Based on the predicted risk of business discontinuation: **STRONG LIKELIHOOD OF CONTINUED OPERATIONS**
- Based on the predicted risk of severely delinquent payments: **VERY LOW POTENTIAL FOR SEVERELY DELINQUENT PAYMENTS**

D&B Viability Rating
 Portfolio Comparison Score

1

Low Risk (1) High Risk (9)

Company's risk level is: LOW

Probability that a company will go out of business, become dormant/inactive, or file for bankruptcy/insolvency within the next 12 months: **0.10 %**

Failure Score Formerly Financial Stress Score

99

Low Risk (100) High Risk (1)

Company's risk level is: LOW

Probability of failure over the next 12 months: **0.02 %**

Past 12 Months

Delinquency Score Formerly Commercial Credit Score

94

Low Risk (100) High Risk (1)

Company's risk level is: LOW

Probability of delinquency over the next 12 months: **1.24 %**

Past 12 Months

PAYDEX®

78

Low Risk (100) High Risk (0)

Days Beyond Terms : 3

Past 24 Months

D&B Rating

Current Rating as of 12-17-2021		Previous Rating	
Financial Strength	Risk Indicator	Financial Strength	Risk Indicator

Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response

4A : US\$ 10,000,000 to US\$ 49,999,999 in Net Worth or Equity

1 : Very Low Risk

4A : US\$ 10,000,000 to US\$ 49,999,999 in Net Worth or Equity

2 : Low Risk

Legal Events

Events	Occurrences	Last Filed
Bankruptcies	0	-
Judgements	0	-
Liens	0	-
Suits	0	-
UCC	15	06-14-2021

Trade Payments

Highest Past Due

US\$ 250

Highest Now Owing
US\$ 15,000

Total Trade Experiences
57

Largest High Credit
US\$ 20,000

Average High Credit
US\$ 4,500

Ownership

This company is a **Global Ultimate, Domestic Ultimate, Headquarters, Parent**

Financial Overview

Source: D&B

Balance sheet Fiscal (Consolidated) 06-30-2021	Amount (In Single Units)	Last 3 Years
Total Current Assets:	US\$ 16,086,887	-
Total Current Liabilities:	US\$ 4,966,108	-
Other Asset:	US\$ 9,827,280	-
Long Term Liabilities:	US\$ 4,586,448	-
Net Worth:	US\$ 16,361,611	-

Profit & Loss Fiscal (Consolidated) 06-30-2021	Amount (In Single Units)	Last 3 Years
Net Income:	US\$ 4,536,613	-
Sales:	US\$ 35,730,533	-

Key Business Ratios

Ratio for the Business




Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response

Key Business Ratios	Ratio for the Business
Current Ratio:	3.24

Country/Regional Insight

United States



Risk Category

LOW

MODERATE

HIGH

Low Risk High Risk

The US ban on oil, natural gas, and coal imports from Russia will fuel already-high inflationary pressures, hitting consumer sentiment and threatening growth prospects; our rating is downgraded.

Risk Assessment

D&B Risk Assessment

Overall Business Risk

LOW

LOW-MODERATE

MODERATE

MODERATE-HIGH

HIGH

Dun & Bradstreet Thinks...

- Overall assessment of this organization over the next 12 months: **VERY STABLE CONDITION**
- Based on the predicted risk of business discontinuation: **STRONG LIKELIHOOD OF CONTINUED OPERATIONS**
- Based on the predicted risk of severely delinquent payments: **VERY LOW POTENTIAL FOR SEVERELY DELINQUENT PAYMENTS**

Maximum Credit Recommendation

US\$ 609,000

The recommended limit is based on a low probability of severe delinquency.

D&B Viability Rating

Portfolio Comparison Score

1

Low Risk (1)

High Risk (9)

Rating Confidence Level

Decision Support

Directional

Basic

Robust Predictions

Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response

Data Depth

- Rich Firmographics
- Extensive Commercial Trading Activity
- Comprehensive Financial Attributes

Level of Risk Low	Probability of becoming no longer viable 0.10%	Percentage of businesses ranked with this score 23.00%
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Average probability of becoming no longer viable
0.60%

Failure Score Formerly Financial Stress Score

99
 Low Risk (100) High Risk (1)

- UCC Filings reported

Level of Risk Low	Raw Score 1695	Probability of Failure 0.02%	Average Probability of Failure for Businesses in D&B Database 0.48%
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Business and Industry Trends

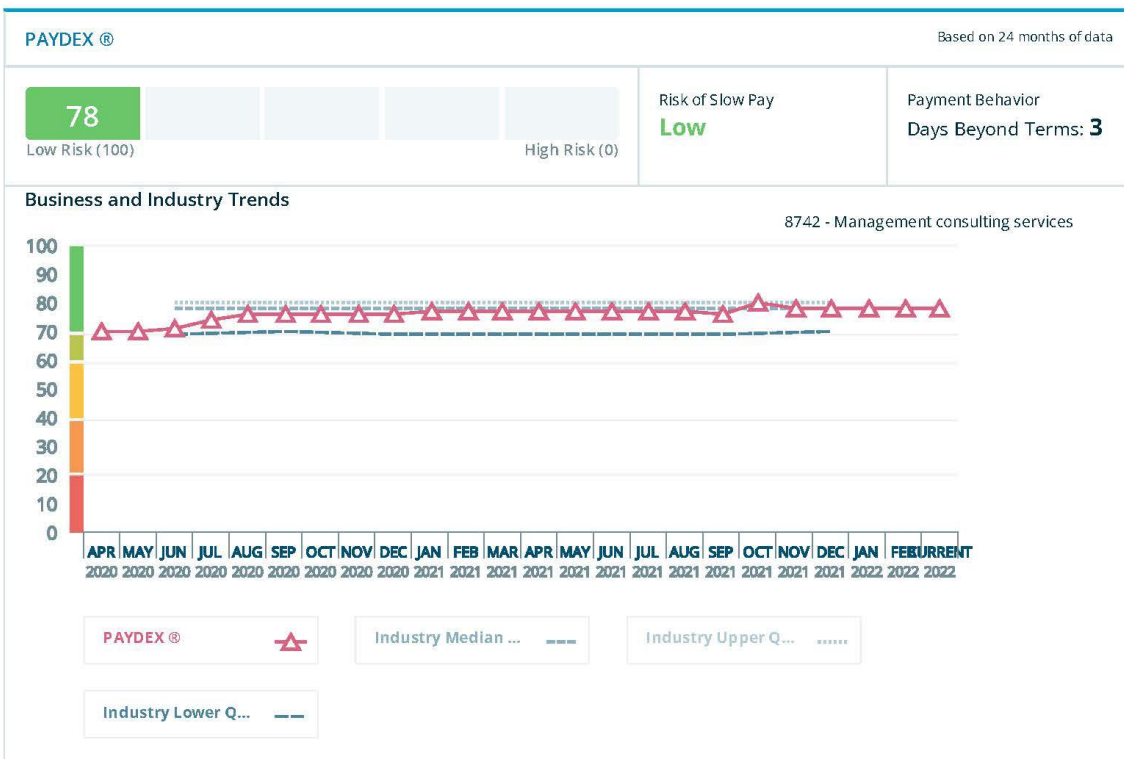
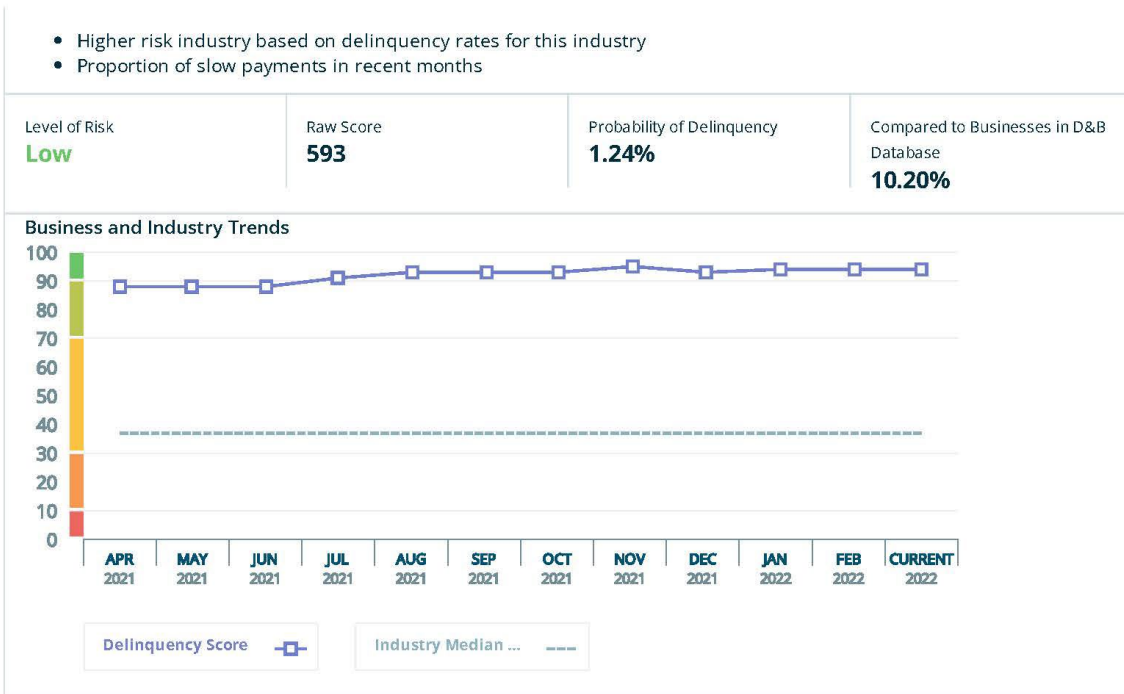
APR 2021	MAY 2021	JUN 2021	JUL 2021	AUG 2021	SEP 2021	OCT 2021	NOV 2021	DEC 2021	JAN 2022	FEB 2022	CURRENT 2022
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Failure Score

Delinquency Score Formerly Commercial Credit Score

94
 Low Risk (100) High Risk (1)

Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response



Institute for Building Technology and Safety (IBTS)
 OMNIA National Contract Response

D&B Rating			
Current Rating as of 12-17-2021		Previous Rating	
Financial Strength	Risk Indicator	Financial Strength	Risk Indicator
4A : US\$ 10,000,000 to US\$ 49,999,999 in Net Worth or Equity	1 : Very Low Risk	4A : US\$ 10,000,000 to US\$ 49,999,999 in Net Worth or Equity	2 : Low Risk

Trade Payments

Trade Payments Summary (Based on 24 months of data)		
Overall Payment Behavior	% of Trade Within Terms	Highest Past Due
3 Days Beyond Terms	99%	US\$ 250
Highest Now Owing: US\$ 15,000	Total Trade Experiences: 57	Total Unfavorable Comments: 0
	Largest High Credit: US\$ 20,000	Largest High Credit: US\$ 0
	Average High Credit: US\$ 4,500	Total Placed in Collections: 0
		Largest High Credit: US\$ 0

Trade Payments By Credit Extended (Based on 12 months of data)			
Range of Credit Extended (US\$)	Number of Payment Experiences	Total Value	% Within Terms
100,000 & over	0	US\$ 0	0
50,000 - 99,999	0	US\$ 0	0
15,000 - 49,999	5	US\$ 85,000	88
5,000 - 14,999	10	US\$ 82,500	100
1,000 - 4,999	10	US\$ 16,000	100
Less than 1,000	17	US\$ 5,500	100

Trade Payments By Industry (Based on 24 months of data)



Attached is the relevant document from the State of Virginia.

IBTS is willing and able to secure any and all local licenses required by the City of Tucson.

Commonwealth of Virginia



State Corporation Commission

CERTIFICATE OF GOOD STANDING

I Certify the Following from the Records of the Commission:

That INSTITUTE FOR BUILDING TECHNOLOGY AND SAFETY is duly incorporated under the law of the Commonwealth of Virginia;

That the corporation was incorporated on August 29, 1997;

That the corporation's period of duration is perpetual; and

That the corporation is in existence and in good standing in the Commonwealth of Virginia as of the date set forth below.

Nothing more is hereby certified.



Signed and Sealed at Richmond on this Date:

May 23, 2022

A handwritten signature in black ink, appearing to read "Bernard J. Logan".

Bernard J. Logan, Clerk of the Commission

IBTS Services Available to Participating Public Agencies

Building Department Services

Plan Review Services

Inspection Services

Assessments

National Green Building Standard (NGBS)

Department Operations

Planning

Current

Long-Range

Project

Zoning and Regulatory Compliance

Project Review

Ordinance Updates and Creation

Storm Water

Plan Review

Flood Plain Review

Energy, Sustainability and Resilience

Resilience Assessment

Project Management

CRAFT Equitable Climate Resilience (ECR) Assessment Tool

Solar quality management

Market Research & Community Engagement

Grant Writing

Grant Research

Grant Writing Support

Grant Management and Administration

