CERTIFIED COPY OF ORDER

STATE OF MISSOURI  County of Boone

In the County Commission of said county, on the

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

Now on this day the County Commission of the County of Boone does hereby award bid
18-25MAR03 for Medical Examiner Support Services to Fountain Enterprises, Inc. It is further
ordered that the Presiding Commissioner be hereby authorized to sign said contract.

Done this 10th day of June, 2003.

ATTEST:

Wendy S. Noren
Clerk of the County Commission

Keith Schnarr
Presiding Commissioner

Karen M. Miller
District I Commissioner

Skip Elkin
District II Commissioner
MEMORANDUM

TO: Boone County Commission
FROM: Melinda Bobbitt, CPPB
DATE: May 30, 2003
RE: 18-25MAR03 – Medical Examiner Support Services

The Proposal for Medical Examiner Support Services closed on March 25, 2003. A total of two proposal responses were received. The evaluation committee consisting of Commissioner Elkin, Dr. Adelstein, Bud Smith, and Tim Harlan recommend award to Fountain Enterprises Inc. The primary reason for this recommendation is due to the documented extensive chief death investigative experience of Jo Fountain.

The initial contract term shall run from July 1, 2003 through June 30, 2004. This contract will be paid out of department 1280 Medical Examiner, account 71101 Professional Services. Total contract award for one year is $75,540. The original budget was for $75,714.

Please find attached a copy of the proposal evaluation for your review.

ATT: Proposal Evaluation

cc: Skip Elkin, District II Commissioner
    Proposal File
Evaluation Report for Proposal

18-25MAR03 – Medical Examiner Support Services

I. OFFEROR #1: B. R. Services

_X_ It has been determined that B. R. Services has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

____ It has been determined that B. R. Services has submitted a non-responsive proposal.

Method of Performance

Strengths:

• Self-supportive – not dependent on outside funeral homes (P3, #3). Offeror will use own removal vehicle for prompt and secure transportation (P5, #6).

• After hours calls are diverted to cell phones, not an answering service – calls and pages are answered immediately (P4, #6).

• Clean, large facility with new epoxy floor in the autopsy room and fans designed to provide ventilation to stop odor from moving to the front of the building. (tour of facility)

Concerns:

• After touring the facility, there was a concern for only one autopsy table in the autopsy room.

• The budget indicates Mr. Rice will not be charging for a personal salary “till 2004”. There is a concern about how he intends to pay his future salary and the possibility of future annual price increases to cover his salary. Mr. Rice’s response during the tour of the facility was that in the future, he would either draw a salary, or the possibility existed that his income would be the rent of the building, and if that was the case, he would then not draw a salary.

• There is a concern that the perception among other funeral directors is that Mr. Rice, in the capacity of Funeral Home Director, would divert business to his funeral home.
• There is a concern that Mr. Rice would not serve as a full-time administrator as he is currently the funeral director for Parker Funeral Home. Mr. Rice’s response during the tour of the facility was that he would be the Parker Funeral Home Director until at least the end of the year. Dori Burke would serve as the Chief death Investigator.

**Experience & Reliability:**

**Strengths:**

- Chief Death Investigator & primary Assistant bring prior service experience along from Fountain Services. Proposed Chief Death Investigator Dori Burke has seven years of investigative and medical examiner support services experience with Boone-Callaway Medical Examiners office (P3, #4).

- Mr. Rice’s many years as a funeral director should give him an excellent understanding of the need for reliability.

**Concerns:**

- Newly formed company with no documented experience. (P3, #1).

**Expertise of Personnel:**

**Strengths:**

- Proposed Chief Investigator has seven years of direct experience as the previous Assistant Death Investigator.

**Concerns:**

- Even though Mr. Rice has extensive experience as a Funeral Director, the committee feels there are differences between the funeral home experience and death investigation experience. The main concern is the limited investigative experience of Mr. Rice. His experience in death “investigation” appears to be limited to the two six-month services from 2002. The Chief Death Investigator has strong experience but the concern is what if the Chief Death Investigator became unavailable (sick leave, etc), who would serve as the Chief Death Investigator? There is not an experienced backup available. Mr. Rice’s response during the tour of the facility was that he has 23 years of experience. Not on a day to day active part of the process, but he has been around it on and off for years. He’s willing to go to investigative school. His employees will be required to take 12-15 hours per year of education.
Summary of B. R. Services Proposal:

- The proposed modern facility was clean, well-ventilated and could support continued growth opportunities. The Chief Death Investigator and Assistant proposed were well qualified. However, the biggest concern was the lack of investigative experience of the administrator, Mr. Rice.

II. OFFEROR #2: Fountain Enterprises, Inc.

_X_ It has been determined that Fountain Enterprises Inc. has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

___ It has been determined that Fountain Enterprises Inc. has submitted a non-responsive proposal.

Method of Performance

Strengths:

- Refrigeration capacity for eight bodies (page 1, #1).

- There is adequate storage space of 1000 square feet for autopsy records which date back to 1965. (Page 1, #1).

Concerns:

- Ventilation and floor in autotopsy room need updating. The response of Ms. Fountain during the tour and in the written Best and Final Offer (BAFO) is that the floor of the autopsy room will be resealed with epoxy paint in a reddish brown color for easier cleaning and disinfecting purposes.

- Records management – backup system not in place. The BAFO response of Fountain Enterprises included that presently the records are periodically backed up and stored on a 3 ½ inch floppy disk. They will continue to be done in this manner or backed up to a CD. These will be stored in a fireproof safe.

- Lack of secure storage of controlled substance medications. The BAFO response of Fountain Enterprises stated that at the present time, all medications collected at scene investigations are kept for one year in a locked cabinet in the storage area. At the beginning of each year, the prior year medications are sent in the biomedical waste containers for incineration. There will be a security code lock added to the storage room door that contains this locking cabinet, and there will be a log kept of each prescription medication collected per individual with a copy of the medication in the respective investigative/autopsy file.
• Lack of facility security.
The BAFO response of Fountain Enterprises states that there is a security code lock on the door leading into the autopsy room from the unloading area that will remain in place. The southeast door of the autopsy room that directly leads to the office will be closed permanently, leaving access to the autopsy room through the east door which opens into the conference room. There will be another security code lock placed on this door to insure there is no access to the records or drugs that are held in the office area when no one is in the office. This code will only be given to the Medical Examiner and staff.

**Experience/Expertise of Contractor**

**Strengths:**

- Proposed Chief Investigator Jo Fountain has 13 years of experience providing investigative services and medical examiner support services for Boone County, with 16 years of total experience (page 1). Proposed Assistant Death Investigator Dori Burke has seven years investigative and medical examiner support services experience (page 2).

- Proposed Chief Investigator and Assistant Death Investigator have documented continuing education classes as documented on page 2.

- Strong letters of reference provided including:
  
  o Dr. Adelstein, Boone County Medical Examiner  
  o Mary Dix, wife of the late medical examiner Dr. Jay Nix  
  o R. G. Boehm, Chief of Police – City of Columbia  
  o T. P. Boehm, Boone County Sheriff  
  o Michael Lee Himmel, Chief of Police – New Bloomfield  
  o R. K. Replogle, Captain – Missouri State Highway Patrol  
  o Michael Curry, M.D., President of Boyce & Bynum Pathology Labs  
  o David Pittman, M.D., Boone Hospital Center

**Concerns:**

- None identified

**Summary of Fountain Enterprises, Inc. Proposal:**

Fountain Enterprises has extensive chief death investigative experience documented by Jo Fountain’s 16 years of experience. The concerns originally noted from the tour of the facility were resolved through negotiation in a Best and Final Offer.
SUMMARY:

Recommendation for Award: Fountain Enterprises Inc.

While the proposed modern facility of B. R. Services was clean, well-ventilated and could support continued growth opportunities, the biggest concern was the lack of investigative experience of the administrator, Mr. Rice. Furthermore, there is a concern about Mr. Rice not acting as the full-time administrator of the investigative office.

Fountain Enterprises brings extensive chief death investigative experience. The committee identified some concerns with the facilities, but these were addressed during negotiations and will be resolved. Overall, the committee felt the extensive experience offered by Fountain Enterprises warranted a recommendation of award to this firm.

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

We recommend that the County of Boone – Missouri award contract to Fountain Enterprises Inc. for the services of RFP 18-25MAR03.

Evaluator’s Signature – Dr. Edward H. Adelstein 5/29/03
Evaluator’s Signature – Commissioner Skip Elkin 5/29/03
Evaluator’s Signature – Bud Smith 5/29/03
Evaluator’s Signature – Tim Harlan 5/29/03
### PURCHASE REQUISITION

**BOONE COUNTY, MISSOURI**

Fountain Enterprises Inc.

<table>
<thead>
<tr>
<th>VENDOR NO.</th>
<th>ADDRESS</th>
<th>CITY</th>
<th>STATE</th>
<th>ZIP</th>
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**DATE**

5/30/03

4916

**VENDOR NAME**

PHONE #

---

**BID DOCUMENTATION**

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

- **Bid /RFP (enter # below)**
- **Sole Source (enter # below)**
- **Emergency Procurement (enter # below)**
- **Written Quotes (3) attached (> $750 to $4,449)**
- **< $750 No Bids Required (enter bid # below if you are purchasing from a bid, even if this purchase is <$750)**
- **Professional Services (see Purchasing Policy Section 3-103)**

**Transaction Not Subject To Bidding For The Following Reason:**

- Utility
- Travel
- Dues
- Refund
- Cooperative Agreement
- Other (Explain):

**#18-25MAR03**

(Enter Applicable Bid / Sole Source / Emergency Number)

**Bill To Department #**

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<td>7 1 1 0 1</td>
<td>Medical Examiner Support Services</td>
<td></td>
<td>$37,770</td>
<td></td>
</tr>
</tbody>
</table>

For the period July 1, 2003 through December 31, 2003. To be paid in monthly increments after receipt of invoice.

---

**CLERK'S OFFICE**

*DO NOT UNSTAPLE THESE PAGES*

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

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

**Requesting Official**

[Signature]

**Auditor Approval**

[Signature]
MEDICAL EXAMINER SUPPORT SERVICES AGREEMENT

THIS AGREEMENT dated the 10th day of June 2003 is made between Boone County, Missouri, a political subdivision of the State of Missouri through the Boone County Commission, herein "County" and Fountain Enterprises, Inc., herein "Contractor."

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

1. Contract Documents - This agreement shall consist of this Contract Agreement for Medical Examiner Support Services in compliance with all proposal specifications, Addendum Number One, Fountain Enterprises' Proposal Response, and the Best and Final Offer Response, issued for the County of Boone - Missouri, Request for Proposal number 18-25MAR03. All such documents shall constitute the contract documents which are incorporated herein by reference. In the event of conflict between any of the foregoing documents, the County's Request for Proposal shall prevail and control over the vendor's proposal response.

2. Contract Duration - This agreement shall commence on July 1, 2003 and extend through December 31, 2003, subject to the provisions for termination specified below. This agreement may be extended beyond the expiration date by order of the County for four additional one year periods and thereafter on a month to month basis in the event the County is unable to re-bid and/or award a new contract prior to the expiration date after exercising diligent efforts to do so or not; provided, however, that from and after the expiration date of this agreement any annual extensions thereof, either party shall have the right to terminate this agreement upon sixty (60) days advance written notice of termination. Upon renewal, the amount of compensation under the agreement shall be adjusted annually each fiscal year that this agreement is renewed in accordance with the budgetary amounts specified by the Medical Examiner and approved by the County; provided, however, that nothing herein shall change Fountain Enterprises' rights to terminate or renegotiate compensation except that any compensation incurred after commencement of the new fiscal year during the pendency of renegotiation or termination shall be paid at the prorated monthly prior year budgeted amount or the county approved current fiscal year budgeted amount for so long as services are actually rendered under this agreement up through the date of contract termination or contract amendment to reflect a new approved amount for compensation. This agreement shall be terminable for any reason upon sixty (60) days advance written notice after contract execution if automatically renewed and may be terminated by County at any time if Fountain Enterprises' appointment by the Medical Examiner is revoked or terminated or if the Chief Death Investigator resigns or engages in conduct which for any reason would justify forfeiture or ouster from office of any other elected or commissioned county officer.

3. Compensation - Contractor shall be compensated for services required under this agreement in a lump sum amount of Seventy Five Thousand, Five Hundred Forty Dollars ($75,540.00) for the initial term of the contract; payment shall be made in the form of 12 equal monthly installments within 15 days of invoice to County. Compensation shall be based upon the budget submitted in proposal response 18-25MAR03 and shall include all cost of professional services, personnel expense, materials and supplies, vehicle expense, administrative services, morgue use, training, telephone, paging and answering services, body transportation

An Affirmative Action/Equal Opportunity Institution
which are not budgeted under this agreement and approved by County and all such expenses shall be paid by Contractor.

4. Records and Billing – The Contractor agrees to keep all official records as required by law and subject to any lawful privilege of confidentiality or other lawful privilege, make such records available to the Boone County Commission, Boone County Auditor, and independent outside auditor appointed by the County for internal audit purposes and to the general public under applicable open meetings and records law. All billings shall be submitted to the County Commission for payment and all invoices or statements submitted by the Contractor to County for payment shall be paid by County no later than the 15 days after receipt of invoice.

5. Insurance – The Contractor shall pay for and maintain at all times business, premises and public liability insurance and automobile liability insurance which will provide coverage for performance of the work and duties under this agreement; all coverage’s and amounts shall be reviewed and approved by the Medical Examiner.

6. Contractual Relationship – The services performed under this agreement shall be provided by the Contractor as an independent contractor and not as a county employee. Accordingly, it is agreed that Fountain Enterprises shall be responsible for all expenses and overhead necessary in performing the obligations of this agreement including all office and administrative expenses, payroll, employee benefits and employer required taxes and contributions for employees hired by the Contractor.

7. Appointment of Assistants – The Contractor may appoint qualified assistants at the Contractor’s sole expense with the approval of the Medical Examiner as need dictates to provide services required by this agreement. Such assistants shall serve at the discretion of the Contractor, provided that the Contractor shall not appoint any assistant to whom the Medical Examiner objects in writing.

8. Medical Examiner Support Services – During the term of this agreement and any extension of it, the Contractor shall provide all services required by the duly appointed Boone County Medical Examiner in the performance of the duties of such office as prescribed by law consistent with and subject to the terms and conditions of this agreement. Such services shall include the following:

8.1. Provision and supervision of adequate qualified personnel appointed as Assistant Death Investigators by the Contractor with the approval of the Medical Examiner to provide death investigation services in Boone County under the direction of the Medical Examiner 365 days per year, 24 hours per day.

8.2. Services shall include by way of description but not limited to: taking telephone reports of deaths, scene investigations and body transport conducted under policies and procedures established by the Medical Examiner, handling and maintaining bodies and personal effects before and after external examination or autopsy under policies and procedures established by the Medical Examiner, assisting the Medical Examiner in the conduct of autopsies as directed by the Medical Examiner, preparation of required regulatory reports in connection with deaths as required by the Medical Examiner, and performing such other duties as the Death
Investigator shall be authorized or required to perform by the Medical Examiner in the performance of his/her duties in office.

8.3. Provision of morgue facilities and equipment approved by the Medical Examiner suitable for the performance and conduct of autopsies and for the refrigerated storage of bodies necessary for the satisfactory performance of the duties of the office of Medical Examiner.

8.4. Provision of administrative and office support for the office of the Medical Examiner including maintenance and administration of the Medical Examiner's annual budget, maintenance and preparation of statistics and reports and such other secretarial and clerical services as are required by and budgeted for by the Medical Examiner.

9. **Binding Effect** - This agreement shall be binding upon the parties hereto and their successors and assigns for so long as this agreement remains in full force and effect.

10. **Entire Agreement** - This agreement constitutes the entire agreement between the parties and supersedes any prior negotiations, written or verbal, and any other bid or bid specification or contractual agreement. This agreement may only be amended by a signed writing executed with the same formality as this agreement.

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

**FOUNTAIN ENTERPRISES INC.**

by [Signature]

title [Title]

APPROVED AS TO FORM:

[Signature]

County Counselor

**BOONE COUNTY, MISSOURI**

by [Signature]

Keith Schmurr, Presiding Commissioner

ATTEST:

[Signature]

Wendy S. Noren, County Clerk

AUDITOR CERTIFICATION

In accordance with RSMo 55.660, I hereby certify that a sufficient unencumbered appropriation balance exists and is available to satisfy the obligation(s) arising from this contract. (Note: Certification of this contract is not required if the terms of this contract do not create a measurable county obligation at this time.)

1280-71101 - $75,540

Signature Date Appropriation Account

Certification applies to $37,770.00 for July - December, 2003 only.
January 6, 2004

Jo Fountain
Fountain Enterprises, Inc.
5609 St. Charles Road
Columbia, MO 65202

RE: 18-25MAR03 – Medical Examiner Services

Dear Ms. Fountain:

The County of Boone wishes to renew the above referenced contract. Confirming the renewal letter received dated December 23, 2003, you agree to renew the contract under the same terms and conditions as set in the original bid with an increase described in your proposed 2004 budget. The contract renewal period will cover January 1, 2004 through December 31, 2004.

Should you have any questions or need additional information, I may be reached at (573) 886-4391 or by e-mail to: mbobbitt@boonecountymo.org.

Sincerely,

Melinda Bobbitt, CPPB
Director of Purchasing

cc: Skip Elkin, District II Commissioner
    Diana Manlove, Auditor
    Shawna Victor, Clerk
    Bid File
December 19, 2003

Jo Fountain
Fountain Enterprises, Inc.
5609 St. Charles Road
Columbia, MO 65202

Dear Ms. Fountain:

The County of Boone is interested in renewing contract #18-25MAR03 – Medical Examiner Support Services, which will expire on December 31, 2003.

Please sign and date below if you agree to renew the contract under the same terms and conditions as set in the original bid for an additional year. The contract renewal period will cover January 1, 2004 through December 31, 2004.

I, Jo Fountain of Fountain Enterprises, Inc. agree to renew contract #18-25MAR03 – Medical Examiner Support Services for an additional year under the same terms and conditions as set in the original bid with a 3 percent price increase. See Attached.

Signature

Jo Fountain
Date

12/23/03

Please sign and date below if you do not wish to renew contract #18-25MAR03 – Medical Examiner Support Services.

I, _________________ of Fountain Enterprises, Inc. do not wish to renew the above referenced contract.

Signature

Date

Please sign and return using the enclosed self-addressed envelope. Should you have a price increase, we will review it with the Boone County Commission, and if approved, we will send you a letter notifying you of the contract extension.

Should you have any questions or need additional information, I may be reached at (573) 886-4391 or by e-mail to: mbobbitt@boonecountymo.org.

Sincerely,

Melinda Bobbitt, CPPB
Director of Purchasing

cc:  Bid File
August 29, 2003

June Pitchford
Boone County Government Center
801 E. Walnut Room 205
Columbia, Mo. 65202

RE: MEDICAL EXAMINER CONTRACT SERVICES FOR 2004

Budget Proposal 2004

Chief Death Investigator Salary $21,800
Death Investigator 18,540
Materials & Supplies 3,090
Vehicle Expense 1,936
Morgue Use (70 cases @ $300/case) 21,000
Utilities 3,498
Training 1,500
Telephone/Mobile Phones 3,239
Transportation of Bodies 3,000
Miscellaneous 1,000

Total $78,663

Thank You.

Jo Fountain
CERTIFIED COPY OF ORDER

STATE OF MISSOURI
County of Boone

In the County Commission of said county, on the
10th day of June 2003

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

Now on this day the County Commission of the County of Boone does hereby award bid 68-15APR03 for Architectural Services for the Interior Renovations and Design and Construction of the Third Floor of the Boone County Government Center to Simon Oswald Associates. It is further ordered that the Presiding Commissioner be hereby authorized to sign said contract.

Done this 10th day of June, 2003.

ATTEST:

Wendy S. Noren
Clerk of the County Commission

Keith Schnarre
Presiding Commissioner

Karen M. Miller
District I Commissioner

Skip Elkin
District II Commissioner
MEMORANDUM

TO: Boone County Commission  
FROM: Melinda Bobbitt, CPPB  
DATE: June 2, 2003  
RE: 08-15APR03 – Architectural Services for the Interior Renovations and Design and Construction of the Third Floor of the Boone County Government Center

The Proposal for Architectural Services for the Interior Renovations and Design and Construction of the Third Floor of the Boone County Government Center closed on April 15, 2003. A total of ten proposal responses were received. The five members of the evaluation committee, consisting of Keith Schnarre, Presiding Commissioner, Bettie Johnson, Recorder, June Pitchford, Auditor, Tom Schauwecker, Assessor, and David Mink, Public Works Director, reviewed the ten proposals received for the architectural services. The committee short listed the proposals to four and interviewed these four firms. Following clarification questions, reference checks and further review, the committee felt that Simon Oswald Associates was the best match for Boone County for this project, and recommends this firm for award.

This contract will be paid out of department 4010 - Administration Building Construction, account 71211 - Architectural/Engineering Fees. Total contract award for Phase I is $24,500.00. The original budget for architectural design and construction documents for completion of the Government Center 3rd floor area is $58,000 and $38,000 remains in that account.

Please find attached a copy of the proposal evaluation for your review.

ATT: Proposal Evaluation  
cc: Keith Schnarre, Presiding Commissioner  
Proposal File
Evaluation Report for Proposal  
08-15APR03 – Architectural Services for the Interior Renovations and Design and Construction of the Third Floor of the Boone County Government Center

I. OFFEROR #1: Ottolino Winters Huebner – St. Louis, MO

_ X _ It has been determined that Ottolino Winters Huebner has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

_ ___ It has been determined that Ottolino Winters Huebner has submitted a non-responsive proposal.

Method of Performance:

Strengths:

• The firm’s overall philosophy and values are explained—the firm emphasizes identifying key decision points in the process and key client personnel who make these decisions; the firm values the importance (and complexity) of designing effective work environments that are also “humane”.
• Responsible for total project
• Documented experience in large commercial remodeling.

Concerns:

• Approach and timeline (Section 5) are very generic which makes it difficult to understand their planned approach.
• Timeline seems overly ambitious.
• Paragraph 3.4.2. , “Offerors should submit proposals which outline in detail services to be provided”. These services were not outlined in detail.
• Addendum #1 not acknowledged and returned.
• Although the proposal stressed the importance of communication, the response does not include any comments or description of activities that indicate an awareness of the complex dynamics inherent in Boone County’s form of government and the effort that may be required to help discover and build consensus. The successful architect must gain an understanding of the needs of all the elected officials and department directors and must be able to guide this diverse group throughout the planning process.
• The information pertaining to the use of other professionals was very vague.
• Communication and expense of being off site
• Not sure they understand our space need study and working with elected officials.
Experience/Expertise of Offeror:

Strengths:

- Demonstrated experience in Interior Design of office space
- Documented experience of a 200,000 square foot interior renovation (Section 1)
- Bob Winters has twenty years experience in interior architecture and environmental design (Section 2). He also has a Master of Architecture from Washington University.
- Nancy Marshall has 25 years experience in interior design (Section 2).
- The two principals (Winters and Marshall) have 50+ combined years of experience on projects of greatly varying size and scope.

Concerns:

- Firm in business only since 1996.
- Most of the projects sited are related to medical facilities. All but one of the projects sited for Marshall are related to a medical facility project. Very little information regarding other firm professional and support staff. Comments regarding the benefit to the County should this firm be selected were very general and not very informative.
- Very little documented experience in government buildings and working with different elected officials. Their background is in health care design where they have strong background on healthcare facilities.
- Continuity with firm of team members

Summary of Ottolino Winters Huebner Proposal Response:

- Although the two principals have extensive experience, the firm lacks experience with projects similar to ours. In addition, the firm’s approach may not be well suited to our governmental structure and the broad range of needs and inherent complexities that result from such structure. There is a concern that they may not understand the amount of time it will take on the space study. The committee does not wish to short list this firm.

II. OFFEROR #2: Butler Rosenbury & Partners – Springfield, MO

X It has been determined that Butler Rosenbury & Partners has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

It has been determined that Butler Rosenbury & Partners has submitted a non-responsive proposal.

Method of Performance:
Strengths:

- Good detailed approach with reasonable time-line detailed in Section 7.
- This firm proposes using their Civic + Community studio which specializes in publicly-funded and community oriented facilities (Section 3 and Section 2).
- This firm presents multiple design solutions and openly evaluates each alternative with their clients (Section 2 – Design Philosophy).
- The Studio-based business structure is very interesting and seems to make a lot of sense. It allows for concentrated resources. It would seem to result in a good match between the assigned professional staff and the business needs of the client. Comments regarding “communication” and “commitment” (BR&P Story) suggest an understanding and appreciation of the complex environment/structure/needs encountered in the public sector. Impressive “fundamental beliefs”—seem to be consistent with the County’s values. Good information regarding arrangements with other firms. Attachment One is very informative and helpful and provides useful information for further exploration during interviews.
- Documented experience and knowledge pertaining to what we want to do with our project and the problems that can be involved in working with elected officials.

Concerns:

- High cost for Phase I with no indication of cost for Phase II.
- Addendum #1 not acknowledged and returned.
- Strong philosophy on their practice of design rather than on the user.
- Communication and expense of being off site in the management of the project.

Experience/Expertise of Offeror:

Strengths:

- Documented experience working on publicly-funded buildings (Section 5).
- Documented office re-modeling – MO-DOT District 8 Headquarters and Green County Court House (Section 5).
- In business since 1978 (Section 1).
- This firm has worked with their mechanical/electrical engineering subcontractor since 1985 (Section 3).
- Good information regarding professional staff of the firm at large. The key personnel for this proposal appear capable and experienced, especially with a principal, Rosenbury, assigned. The firm cites numerous similar projects, several of which pertain to state and local government. Comments pertaining to the benefit to the County should this firm be selected were very good. The firm appears to have a good understanding of local government and of Boone County’s needs, in particular.
- Stability of team members with the firm.
• Strong government client background
• Has worked on projects that involved elected officials – Green County, Boone County Court House. Knows Boone County well.

Concerns:
• None identified

Summary of Butler Rosenbury & Partner’s Proposal Response:
• The approach appears consistent with our needs. The firm has extensive experience on similar projects, and the key personnel appear well qualified. There is an excellent chart of time and cost allocation of team members. Overall, it appears to be a very good proposal. The committee wishes to short list and offer an interview to this firm.

III. OFFEROR #3: Chinn & Associates, Inc. – Columbia, MO

X___ It has been determined that Chinn & Associates has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

___ It has been determined that Chinn & Associates has submitted a non-responsive proposal.

Method of Performance:

Strengths:
• Reasonable time-line
• During the Construction Document phase, Chinn and Associates reviews all bid documents for compliance and assists in the advertisement and distribution of such. They also make a recommendation of award (Reflecting the Goals of the Owner).
• During the Construction Phase, the architects monitor the construction throughout and all communication with the General Contractor goes through the Architect (Reflecting the Goals of the Owner).
• This firm will include a revised space study detailing a short-term and long-term plan for relocation of offices and renovations to accommodate growth over time (The Approach in Collecting and Verifying Information).
• Alternative plan layouts will be presented for review and discussion to the County representatives (The Approach in Collecting and Verifying Information).
• Local access for communication and oversight
• Has understanding of our needs to be able to estimate costs well.
Concerns:

- Most projects listed are for smaller projects
- Because of being a smaller firm, Boone County would need to clarify their list of current contracts that they are presently working on to help determine this firm’s ability to handle this project.
- Addendum #1 not acknowledged and returned.
- No interior design services provided by the firm, so the County would not be able to interview this principal.
- Although the Offeror provides extensive detail regarding the approach to be used, the description of the Basic Architectural/Engineering Services outlined for Phase I doesn’t include many of the details outlined in the “Approach” section. Unclear what procedures and approach will be used in Phase I.
- Makes reference to obtaining input from oversight committee rather than from officials and individuals

Experience/Expertise of Offeror:

Strengths:

- The firm is experienced, citing numerous projects of similar size and scope and has a good track record regarding accuracy of cost estimates. The two principals clearly have a strong commitment to the local community and a history of involvement through various projects and other activities to the community. This firm would seem to have an understanding of the needs of local government.
- Stability and experience of the two principal firm members

Concerns:

- The proposal contained numerous spelling, grammatical, and typographical errors. This reflects poorly on the firm’s attention to detail.
- This firm may have to contract more work out than other firms, including the Interior Design aspect. There might be a need for a construction manager.

Summary of Chinn and Associate’s Proposal Response:

- The Offeror appears to have a good understanding of the needs of the County, is qualified and experienced, and has described an overall approach that appears sound. However, the lack of the interior design component and the prevalence of spelling and grammar errors throughout the proposal are significant shortcomings. Proposal somewhat difficult to review and not well organized. The committee does not wish to short list this firm.
IV. OFFEROR #4: SBWE Architects – Sedalia, MO

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

____ It has been determined that SBWE Architects has submitted a **non-responsive** proposal.

**Method of Performance:**

**Strengths:**

- None identified

**Concerns:**

- This firm did not include a clear price quote.
- Addendum #1 not acknowledged and returned.
- The response does not include a description of the approach, scope and schedule to be used for this project. The proposal includes a description/definition of “Design”, but this is a very “text-book” response that does not provide the evaluation team with the information needed to assess the specific approach to be used on this project.
- The response does not include a time estimate for completion.
- The response does not include a summary of arrangements with work to be performed by other firms.
- Lacked specific timetable and fee schedules for projects.
- Communication and expense of being off site.

**Experience/Expertise of Offeror:**

**Strengths:**

- None identified

**Concerns:**

- Unclear how long the present owners of SBWE Architects have been in business.
- Strong in correctional facilities rather than public, decentralized buildings

**Summary of SBWE Architect’s Proposal Response:**
Proposal was somewhat difficult to review for requirements. There was no mention of the specific project. It was a completely generic proposal. The “not to exceed” cost figure was not included. The committee does not wish to short list this firm.

V. OFFEROR #5: Mitzel + Scroggs Architects – Columbia, MO

X__ It has been determined that Mitzel + Scroggs Architects has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

_____ It has been determined that Mitzel + Scroggs Architects has submitted a non-responsive proposal.

Method of Performance:

Strengths:

• This firm will provide all documents necessary from start to finish in Phase I including providing research, inventory, interview and prepare proposals, alternatives, schematic layouts, concept drawings, sketches, cost estimates, etc. (Page 1).
• Well-defined and very logical approach to this project. The time estimates seem very consistent with the work described. Arrangements with other firms clearly described.
• Local access for communication and oversight of projects for this type.

Concerns:

• The method did not specifically address the need to work with numerous elected officials. The response referred to working with the “building committee” and appropriate staff which may have been standard language terminology used in other situations. There was a reference to the City of Columbia rather than Boone County. The evaluation committee would need to obtain assurances through the interview process that the principal understands the need to work effectively with numerous elected officials.

Experience/Expertise of Offeror:

Strengths:

• The Offeror clearly has extensive experience that is applicable to the project at hand. Professional staff is qualified and experienced and arrangements with other
firms are clearly described. Documented 75 years of combined experience between the two principals (Principal).

- Documented experience with County government.

Concerns:

- The proposal seems to contain disproportionate amounts of information regarding G&W Engineering, particularly on this project (Government Center 3rd floor build-out) where design with mechanical and electrical components will be less significant than in new construction.

- Unclear if this firm understands the need to work with the elected officials in developing to plan.

Summary of Mitzel + Seroggs Architect's Proposal Response:

- The general approach, experience, and expertise appear adequate. Proposal somewhat difficult to review for required information. The committee does not wish to short list this firm.

VI. OFFEROR #6: Peckham & Wright Architects - Columbia, MO

X It has been determined that Peckham & Wright Architects has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

It has been determined that Peckham & Wright Architects has submitted a non-responsive proposal.

Method of Performance:

Strengths:

- Team approach of architects and engineers selected by professional experience (pages 6 and 27).
- Offeror has a clear understanding of the local governmental environment and did an excellent job of describing the approach. This provides a good basis for further exploration during an interview. Offeror provided useful information concerning arrangements with other firms/professionals. Thorough comments regarding the benefits that this firm can offer Boone County. This provides useful information for consideration during the evaluation process and for discussion in an interview.
- Expressed strong collaborative philosophy between architect and elected officials.
• Local access for communication and oversight

Concerns:

• Addendum #1 was not acknowledged or returned.
• Having done the 2900 space study, will they take a firm look at the project to see if the needs have changed?
  o Addressed during the presentation. Mr. Peckham stated they will re-look at the space study with a fresh perspective. Kathy said they did not think it was appropriate to talk to each office holder before the proposal opening, but they've gleamed there have been changes since the completion of this space study. She said they will be approaching with objectivity. They are looking at growth changes over 20-30 years.

Experience/Expertise of Offeror:

Strengths:

• Principal and other professional staff are clearly qualified. The firm has extensive experience across a broad range of projects and team members have significant tenure with the firm. Similar projects were provided.
• Founded in 1978 (page 1).
• Many entities have used this firm repeatedly for their projects (page 1).
• Documented experience with Boone County and county government.

Concerns:

• None identified

Summary of Peckham & Wright Architect’s Proposal Response:

• The approach appears consistent with our needs, the firm has extensive experience on similar projects, and the key personnel appear well qualified. Overall, it appears to be an excellent presentation of materials for review. The committee desires to short list and offer an interview to this firm.

VII. OFFEROR #7: Bucher, Willis & Ratliff Corporation – Kansas City, MO

X  It has been determined that Bucher, Willis & Ratliff has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

___  It has been determined that Bucher, Willis & Ratliff has submitted a non-responsive proposal.
Method of Performance:

Strengths:

- The key personnel assigned to the project are clearly detailed. The time line is very clear.
- Large firm

Concerns:

- Proposed the highest cost estimates (last page).
- Approach outline fairly generic.
- This firm appears to have a vague comprehension of project scope.
- They did not provide how they understand Boone County government and working with elected officials.
- Addendum #1 was not acknowledged or returned.
- Communication and expense of being off site.
- There is no obvious indication that the firm understands the organizational complexities of local government in general and Boone County specifically. The proposal did a marginal job of explaining the specific benefits their firm would bring to Boone County should they be selected. Interior design needs and services do not appear to be addressed in the response. None of the key personnel appear to be qualified in this regard or intending to provide these services. It is not clear whether or not the County would be expected to contract with another firm for interior design and furnishing needs. The amount of time allotted to on-site interviews may be a little short, given the organizational structure of the County.

Experience/Expertise of Offeror:

Strengths:

- Staff is clearly experienced and the firm has no need to contract with other firms/professionals, as all of their needs are met with an extensive in-house staff (with the exception of interior design.) The firm has extensive experience across a wide range of projects and entities.

Concerns:

- Experience and expertise pertaining to interior design and furnishings is not addressed.
- Lacked specific county work and references.
- Lacked sufficient information on qualification and background of firm.
- Lacked any statement of arrangements with other firms.
Most of the projects done by the principals involved were outdoors, including parks and maintenance projects. There is little documented experience pertaining to remodel of government buildings.

Summary of Bucher, Willis & Ratliff Corporation’s Proposal Response:

- The Offeror appears to be qualified and experienced. However, the firm’s approach may not be well suited to our organizational structure and the broad range of needs and inherent complexities that result from such structure. In addition, the lack of the interior design component is a significant shortcoming. The committee does not wish to short list this firm.

VIII. OFFEROR #8: Simon Oswald Associates – Columbia, MO

_ X _ It has been determined that Simon Oswald Associates has submitted a responsive proposal meeting the requirements set forth in the original Request for Proposal.

_____ It has been determined that Simon Oswald Associates has submitted a non-responsive proposal.

Method of Performance:

Strengths:

- Provided a detailed plan with a clear outline of the Master Plan described.
- The proposal reflects excellence in organization and presentation. The description of the firm is thorough and extensive and provides an excellent framework for understanding the specific approach presented for this project. From the firm description, we can clearly understand the values and objectives that guide the OSA approach and determine if it is a good match for Boone County. Use of in-house professionals as well as contractual services is clearly outlined. The time table is a bit longer than some of the others, but it seems very realistic for the approach described.
- Local firm that knows Boone County government. Understands our needs and has the experience to do the work.

Concerns:

- No concerns on their performance, but Phase II cost are high (10%).
  - Addressed during the Best and Final Offer
    - Project Range of $1,000,000 - $1,500,000 is 8%
    - Project range of $1,500,000 to $2,000,000 is 7.5%

Experience/Expertise of Offeror:
Strengths:

- Extensive experience with similar projects (*Representative Projects*).
- Emphasis on aesthetics.
- Personnel have extensive qualifications and experience and significant tenure with the firm. The presentation of similar projects was thorough, well organized, and informative. The number and variety of projects is very impressive.
- The firm appears to understand what we need in the space study and design needs. They have worked within and understand the Boone County area.

Concerns:

- It would be helpful to learn if all of the personnel presented will be involved with this project and if so, what their respective roles will be.
  - This was addressed during the presentation with the following:
    - Julie Taggart – architect and interior designers are important to have in the initial meetings. Julie Taggart and Shelly Simon are involved in planning. Kirk Mescher/mechanical is involved early in the project. We bring in Bill Oswald/technical side and a project manager during the construction phase. This is how we go from the big detail to smaller projects.
  - Tenure:
    - Julie Taggart – since 1999
    - Shelly and Bill – since the beginning
    - Jennifer Hedrick – Associate – since 1995
    - Kirk – 10 years working with this firm

Summary of Simon Oswald Associate's Proposal Response:

- The approach appears consistent with our needs, the firm has extensive experience on similar projects, and the key personnel appear well qualified. Overall, it appears to be a very good proposal and this firm appears to understand what the County wants in the project. Visual exhibits were helpful in review. The committee wishes to short list and offer an interview to this firm.

IX. OFFEROR #9: Treanor Architects – Kansas City, MO

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

_____ It has been determined that Treanor Architects has submitted a **non-responsive** proposal.

Method of Performance:
**Strengths:**

- The firm’s size is substantial and could provide significant resources for this engagement. The approach and timeline appear reasonable.
- Documented projects provided for this type project. This is a full service firm.

**Concerns:**

- Approach outline fairly generic
- Timeline too long (up to six months for Phase I)
- Addendum #1 was not acknowledged or returned
- The planned approach is described in fairly general terms and task oriented (i.e., verifying space studies and updating and assessing furniture) and seems to lack an emphasis on gaining an understanding of clarifying County Officials’ needs and goals. For instance, the described approach doesn’t address issues such as building security, public accessibility, common areas, etc. and the steps the firm will take to ensure that these issues are adequately addressed and integrated into the overall design process.
- Communication and expense of being off site.
- The question arose among the committee that this project might be too small for this firm.

**Experience/Expertise of Offeror:**

**Strengths:**

- Many repeat customers as described in the *Firm History*.
- The firm, as a whole, and key personnel in particular, have extensive experience including experience with local government projects and remodeling projects.
- Sufficient group of county facility references.

**Concerns:**

- The Firm Description includes information regarding the firm’s structure, work, and accomplishments; however, it doesn’t convey much information about the firm’s values, guiding principles, etc. This information is necessary in order to evaluate the extent to which the firm’s philosophy and approach is consistent with the approach most appropriate for the County at this time.
- A general proposal that did not tell how they would look at Boone County.
- What is the current tenure of team members that are assigned to this project?

**Summary of Treanor Architect’s Proposal Response:**

- Visual exhibits helpful with information. Key personnel appear to have the experience and expertise required for this project. However, the firm’s approach may not be well suited to our governmental structure and the broad range of needs
and inherent complexities that result from such structure. In addition, very little information is provided to help us understand the firm's foundational or guiding philosophies and values. The committee does not wish to short list this firm.

**X. OFFEROR #10: Shaughnessy Fickel and Scott Architects – Kansas City, MO**

__X__ It has been determined that Shaughnessy Fickel and Scott Architects has submitted a **responsive** proposal meeting the requirements set forth in the original Request for Proposal.

_____ It has been determined that Shaughnessy Fickel and Scott Architects has submitted a **non-responsive** proposal.

**Method of Performance:**

**Strengths:**

- Excellent detailed outline of tasks
- Emphasis on teamwork and consensus building through communication to meet the end objectives (*Benefits*).
- Excellent information provided regarding the firm's philosophy and their clear, detailed approach to projects, in general. In addition, the information provided regarding the benefits of this firm were very thoughtful, detailed, and thorough. The response also contains useful information regarding cost control and historical performance data regarding budget versus actual cost. The approach emphasizes communication and consensus building. Timetable appears reasonable and consistent with the planned approach.
- Indicates total services handled within the firm including interior design.
- Documented experience in government buildings. This firm appears to understand the process the County needs for this project.

**Concerns:**

- Communication and expense of being off site.
- Directs communication to project group rather than officials and individuals.
  - Firm addressed during the interview that they have worked with elected officials and department heads in the past.
  - Have a lot of experience working with a large group of people working with stakeholders and department heads.
  - Examples include Lafayette County Government Center – Law Enforcement Center. Also, Old City Hall which is a very historic building which they are restoring. Lee Summit, MO – City Hall.
Experience/Expertise of Offeror:

Strengths:

• Extensive public sector experience.
• Documented cost control with construction cost estimate versus bid comparison for the past ten years (Section 4).

Concerns:

• The proposal is not clear on the use of contractual services with other professionals. There is one reference in the Cost Control section (in the discussion of benefits to Boone County from using this firm). The proposal does not clearly state whether or not other services, such as M,E,&P engineering will be contracted out.
  o Addressed during the presentation. This firm will be using outside consultants for engineering. There are three primary firms that they work with, depending on these firm’s schedules.
• Lacks information of tenure with firm of other team members.
  o Addressed during the presentation:
    o Bill Scott – 30 years experience – founder of firm
    o Kerry Newman – 18 years experience – Jr. Principal since 1988
    o Marsha Hoffman – 17 years experience – Senior Associate – 9 years with firm
    o Dawn Walker – Interior Designer – 1 year with firm.

Summary of Shaughnessy Fickel and Scott Architect’s Proposal Response:

• Good outline of proposal with visual exhibits which are helpful. Cost containment schedule offers additional resources. The committee wishes to short list and offer an interview to this firm.

SUMMARY:

Recommendation for Award: Simon Oswald Associates

The five members of the evaluation committee, consisting of Keith Schnarre, Presiding Commissioner, Bettie Johnson, Recorder, June Pitchford, Auditor, Tom Schauwecker, Assessor, and David Mink, Public Works Director, reviewed the ten proposals received for the architectural services. The committee short listed the proposals to four and interviewed these four firms. Following clarification questions, reference checks and further review, the committee felt that Simon Oswald Associates was the best match for Boone County for this project.

This evaluation report represents our subjective opinion of each offeror’s strengths and concerns and is based upon our analysis of the relevant facts, as contained in each offeror’s proposal. We recommend that the County of Boone – Missouri award contract to Simon Oswald Associates for the services of RFP 08-15APR03.
PURCHASE REQUISITION
BOONE COUNTY, MISSOURI

Simon Oswald Associates

VENDOR NAME

ADDRESS

CITY

STATE ZIP

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

☐ Bid /RFP (enter # below)
☐ Sole Source (enter # below)
☐ Emergency Procurement (enter # below)
☐ Written Quotes (3) attached (>750 to $4,449)
☐ <$750 No Bids Required (enter bid # below if you are purchasing from a bid, even if this purchase is <$750)
☐ Professional Services (see Purchasing Policy Section 3-103)

Transaction Not Subject To Bidding For The Following Reason:
☐ Utility
☐ Travel
☐ Dues
☐ Refund
☐ Cooperative Agreement
☐ Other (Explain):

#08-15APR03
(Enter Applicable Bid / Sole Source / Emergency Number)

Bill To Department #

Department | Account | Item Description | Qty | Unit Price | Amount
--- | --- | --- | --- | --- | ---
0 | 1 | Architectural Services for Phase I of the Interior Renovations and Design and Construction of the Third Floor of the Boone County Government Center | 1 | | $24,500

CLERK'S OFFICE

*DO NOT UNSTAPLE THESE PAGES

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

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

Keith

Requesting Official

Auditor Approval
Effective the 10th day of JUNE, 2003, Boone County, Missouri, a political subdivision of the state of Missouri through its Boone County Commission, (herein “Owner”) hereby approves and authorizes professional services by the Consultant referred to below for the services specified below.

Consultant Name: Simon Oswald Associates, Inc.

Project/Work Description: Boone County Government Center Renovations - Phase I

Proposal Description: (identify proposal by date, person issuing proposal and attach a copy of proposal) See attached Request for Proposal 08-15APR003 and Addendum # 1 and Consultant proposal as revised and dated 5-23-03

Modifications to Proposal: (identify any modifications or attach correspondence modifying proposal, or show as not applicable) Hourly fees and reimbursable expenses not to exceed $24,500.00 for Phase I services. Fees and expenses paid for Phase I services shall be credited toward Phase II services, if awarded.

This form agreement and any attachments to it shall be considered the approved proposal; signature by all parties below constitutes a contract for services in accordance with the above described proposal and any approved modifications to the proposal, both of which shall be in accordance with the terms and conditions of the General Consultant Services Agreement signed by the Consultant and Owner for the current calendar year on file with the Boone County Public Works Department, which is hereby incorporated by reference. Performance of Consultant's services and compensation for services shall in accordance with the approved proposal and any approved modifications to it and shall be subject to and consistent with the General Consultant Services Agreement for the current calendar year. In the event of any conflict in interpretation between the proposal approved herein and the general Consultant Services Agreement, the terms and conditions of the general agreement shall control unless the proposal approved herein specifically identifies a term or condition of the general Consultant Services Agreement that shall not be applicable.

CONSULTANT

By: ___________________________
Title: President
Dated: 06/13/03

APPROVED AS TO FORM:

County Counselor

BOONE COUNTY, MISSOURI

By: ___________________________
Title: Presiding Commissioner
Dated: 06/10 JUNE 2003

ATTEST:

Elgy 5. Now
County Clerk

CERTIFICATION:

I certify that this contract is within the purpose of the appropriation to which it is to be charged and there is an unencumbered balance of such appropriation sufficient to pay the costs arising from this contract.

Auditor: ___________________________
Date: 11/15/2003

#24,530.00

4010-71211