

**MASTER AGREEMENT #102424****CATEGORY: Facility Assessment and Planning with Related Services****SUPPLIER: Armstrong Torseth Skold and Rydeen, Inc.**

This Master Agreement (Agreement) is between Sourcewell, a Minnesota service cooperative located at 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 (Sourcewell) and Armstrong Torseth Skold and Rydeen, Inc., 8501 Golden Valley Road, Suite 300, Minneapolis, MN 55427 (Supplier).

Sourcewell is a local government and service cooperative created under the laws of the State of Minnesota (Minnesota Statutes Section 123A.21) offering a Cooperative Purchasing Program to eligible participating government entities.

Under this Master Agreement entered with Sourcewell, Supplier will provide Included Solutions to Participating Entities through Sourcewell's Cooperative Purchasing Program.

**Article 1:  
General Terms**

The General Terms in this Article 1 control the operation of this Master Agreement between Sourcewell and Supplier and apply to all transactions entered by Supplier and Participating Entities. Subsequent Articles to this Master Agreement control the rights and obligations directly between Sourcewell and Supplier (Article 2), and between Supplier and Participating Entity (Article 3), respectively. These Article 1 General Terms control over any conflicting terms. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Purpose.** Pursuant to Minnesota law, the Sourcewell Board of Directors has authorized a Cooperative Purchasing Program designed to provide Participating Entities with access to competitively awarded cooperative purchasing agreements. To facilitate the Program, Sourcewell has awarded Supplier this cooperative purchasing Master Agreement following a competitive procurement process intended to meet compliance standards in accordance with Minnesota law and the requirements contained herein.
- 2) **Intent.** The intent of this Master Agreement is to define the roles of Sourcewell, Supplier, and Participating Entity as it relates to Sourcewell's Cooperative Purchasing Program.
- 3) **Participating Entity Access.** Sourcewell's Cooperative Purchasing Program Master Agreements are available to eligible public agencies (Participating Entities). A Participating Entity's authority to access Sourcewell's Cooperative Purchasing Program is determined through the laws of its respective jurisdiction.
- 4) **Supplier Access.** The Included Solutions offered under this Agreement may be made available to any Participating Entity. Supplier understands that a Participating Entity's use of this Agreement is at the Participating Entity's sole convenience. Supplier will educate its sales and service forces about Sourcewell eligibility requirements and required documentation. Supplier will be responsible for ensuring sales are with Participating Entities.

- 5) **Term.** This Agreement is effective upon the date of the final signature below. The term of this Agreement is four (4) years from the effective date. The Agreement expires at 11:59 P.M. Central Time on January 3, 2029, unless it is cancelled or extended as defined in this Agreement.
- a) **Extensions.** Sourcewell and Supplier may agree to up to three (3) additional one-year extensions beyond the original four-year term. The total possible length of this Agreement will be seven (7) years from the effective date.
- b) **Exceptional Circumstances.** Sourcewell retains the right to consider additional extensions as required under exceptional circumstances.
- 6) **Survival of Terms.** Notwithstanding the termination of this Agreement, the obligations of this Agreement will continue through the performance period of any transaction entered between Supplier and any Participating Entity before the termination date.
- 7) **Scope.** Supplier is awarded a Master Agreement to provide the solutions identified in RFP #102424 to Participating Entities. In Scope solutions include:
- a) Facility and building condition assessment and auditing;
  - b) Energy, utility, and emissions assessment and planning;
  - c) Site, safety, and code inspections;
  - d) Space utilization and planning;
  - e) Geographic information system (GIS) services
  - f) Feasibility, sustainability, and lifecycle assessment;
  - g) Asset, capital, and deferred maintenance planning and asset classification;
  - h) Benchmarking services and quality assurance;
  - i) Project management and coordination with facility owners;
  - j) Contract management and financial monitoring; and
  - k) Budget development, and program management services.
- 8) **Included Solutions.** Supplier's Proposal to the above referenced RFP is incorporated into this Master Agreement. Only those Solutions included within Supplier's Proposal and within Scope (Included Solutions) are included within the Agreement and may be offered to Participating Entities.
- 9) **Indefinite Quantity.** This Master Agreement defines an indefinite quantity of sales to eligible Participating Entities.
- 10) **Pricing.** Pricing information (including Pricing and Delivery and Pricing Offered tables) for all Included Solutions within Supplier's Proposal is incorporated into this Master Agreement.
- 11) **Not to Exceed Pricing.** Suppliers may not exceed the prices listed in the current Pricing List on file with Sourcewell when offering Included Solutions to Participating Entities. Participating Entities may request adjustments to pricing directly from Supplier during the negotiation and execution of any transaction.
- 12) **Open Market.** Supplier's open market pricing process is included within its Proposal.

**13) Supplier Representations:**

- i) **Compliance.** Supplier represents and warrants it will provide all Included Solutions under this Agreement in full compliance with applicable federal, state, and local laws and regulations.
  - ii) **Licenses.** As applicable, Supplier will maintain a valid status on all required federal, state, and local licenses, bonds, and permits required for the operation of Supplier's business with Participating Entities. Participating Entities may request all relevant documentation directly from Supplier.
  - iii) **Supplier Warrants.** Supplier warrants that all Included Solutions furnished under this Agreement are free from liens and encumbrances, and are free from defects in design, materials, and workmanship. In addition, Supplier warrants the Solutions are suitable for and will perform in accordance with the ordinary use for which they are intended.
- 14) **Bankruptcy Notices.** Supplier certifies and warrants it is not currently in a bankruptcy proceeding. Supplier has disclosed all current and completed bankruptcy proceedings within the past seven years within its Proposal. Supplier must provide notice in writing to Sourcewell if it enters a bankruptcy proceeding at any time during the term of this Agreement.
- 15) **Debarment and Suspension.** Supplier certifies and warrants that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota, the United States federal government, or any Participating Entity. Supplier certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this Agreement. Supplier further warrants that it will provide immediate written notice to Sourcewell if this certification changes at any time during the term of this Agreement.
- 16) **Provisions for non-United States federal entity procurements under United States federal awards or other awards (Appendix II to 2 C.F.R § 200).** Participating Entities that use United States federal grant or other federal funding to purchase solutions from this Agreement may be subject to additional requirements including the procurement standards of the Uniform Administrative Requirements, Cost Principles and Audit Requirements for Federal Awards, 2 C.F.R. § 200. Participating Entities may have additional requirements based on specific funding source terms or conditions. Within this Section, all references to "federal" should be interpreted to mean the United States federal government. The following list applies when a Participating Entity accesses Supplier's Included Solutions with United States federal funds.
- i) **EQUAL EMPLOYMENT OPPORTUNITY.** Except as otherwise provided under 41 C.F.R. § 60, all agreements that meet the definition of "federally assisted construction contract" in 41 C.F.R. § 60-1.3 must include the equal opportunity clause provided under 41 C.F.R. § 60-1.4(b), in accordance with Executive Order 11246, "Equal Employment Opportunity" (30 FR 12319, 12935, 3 C.F.R. §, 1964-1965 Comp., p. 339), as amended by Executive Order 11375, "Amending Executive Order 11246 Relating to Equal Employment Opportunity," and implementing regulations at 41 C.F.R. § 60, "Office of Federal Contract Compliance Programs, Equal Employment Opportunity, Department of Labor." The equal opportunity clause is incorporated herein by reference.

ii) **DAVIS-BACON ACT, AS AMENDED (40 U.S.C. § 3141-3148).** When required by federal program legislation, all prime construction contracts in excess of \$2,000 awarded by non-federal entities must include a provision for compliance with the Davis-Bacon Act (40 U.S.C. § 3141-3144, and 3146-3148) as supplemented by Department of Labor regulations (29 C.F.R. § 5, “Labor Standards Provisions Applicable to Contracts Covering Federally Financed and Assisted Construction”). In accordance with the statute, contractors must be required to pay wages to laborers and mechanics at a rate not less than the prevailing wages specified in a wage determination made by the Secretary of Labor. In addition, contractors must be required to pay wages not less than once a week. The non-federal entity must place a copy of the current prevailing wage determination issued by the Department of Labor in each solicitation. The decision to award a contract or subcontract must be conditioned upon the acceptance of the wage determination. The non-federal entity must report all suspected or reported violations to the federal awarding agency. The contracts must also include a provision for compliance with the Copeland “Anti-Kickback” Act (40 U.S.C. § 3145), as supplemented by Department of Labor regulations (29 C.F.R. § 3, “Contractors and Subcontractors on Public Building or Public Work Financed in Whole or in Part by Loans or Grants from the United States”). The Act provides that each contractor or subrecipient must be prohibited from inducing, by any means, any person employed in the construction, completion, or repair of public work, to give up any part of the compensation to which he or she is otherwise entitled. The non-federal entity must report all suspected or reported violations to the federal awarding agency. Supplier must comply with all applicable Davis-Bacon Act provisions.

iii) **CONTRACT WORK HOURS AND SAFETY STANDARDS ACT (40 U.S.C. § 3701-3708).** Where applicable, all contracts awarded by the non-federal entity in excess of \$100,000 that involve the employment of mechanics or laborers must include a provision for compliance with 40 U.S.C. §§ 3702 and 3704, as supplemented by Department of Labor regulations (29 C.F.R. § 5). Under 40 U.S.C. § 3702 of the Act, each contractor must be required to compute the wages of every mechanic and laborer on the basis of a standard work week of 40 hours. Work in excess of the standard work week is permissible provided that the worker is compensated at a rate of not less than one and a half times the basic rate of pay for all hours worked in excess of 40 hours in the work week. The requirements of 40 U.S.C. § 3704 are applicable to construction work and provide that no laborer or mechanic must be required to work in surroundings or under working conditions which are unsanitary, hazardous or dangerous. These requirements do not apply to the purchases of supplies, materials, or articles ordinarily available on the open market, or contracts for transportation or transmission of intelligence. This provision is hereby incorporated by reference into this Agreement. Supplier certifies that during the term of an award for all Agreements by Sourcwell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

iv) **RIGHTS TO INVENTIONS MADE UNDER A CONTRACT OR AGREEMENT.** If the federal award meets the definition of “funding agreement” under 37 C.F.R. § 401.2(a) and the recipient or subrecipient wishes to enter into a contract with a small business firm or nonprofit organization regarding the substitution of parties, assignment or performance of experimental, developmental, or research work under that “funding agreement,” the recipient or subrecipient must comply with the requirements of 37 C.F.R. § 401, “Rights to Inventions Made by Nonprofit Organizations and Small Business Firms Under Government Grants, Contracts and Cooperative Agreements,” and any implementing regulations issued by the awarding agency. Supplier

certifies that during the term of an award for all Agreements by Sourcewell resulting from this procurement process, Supplier must comply with applicable requirements as referenced above.

v) **CLEAN AIR ACT (42 U.S.C. § 7401-7671Q.) AND THE FEDERAL WATER POLLUTION CONTROL ACT (33 U.S.C. § 1251-1387).** Contracts and subgrants of amounts in excess of \$150,000 require the non-federal award to agree to comply with all applicable standards, orders or regulations issued pursuant to the Clean Air Act (42 U.S.C. § 7401- 7671q) and the Federal Water Pollution Control Act as amended (33 U.S.C. § 1251- 1387). Violations must be reported to the Federal awarding agency and the Regional Office of the Environmental Protection Agency (EPA). Supplier certifies that during the term of this Agreement it will comply with applicable requirements as referenced above.

vi) **DEBARMENT AND SUSPENSION (EXECUTIVE ORDERS 12549 AND 12689).** A contract award (see 2 C.F.R. § 180.220) must not be made to parties listed on the government wide exclusions in the System for Award Management (SAM), in accordance with the OMB guidelines at 2 C.F.R. § 180 that implement Executive Orders 12549 (3 C.F.R. § 1986 Comp., p. 189) and 12689 (3 C.F.R. § 1989 Comp., p. 235), "Debarment and Suspension." SAM Exclusions contains the names of parties debarred, suspended, or otherwise excluded by agencies, as well as parties declared ineligible under statutory or regulatory authority other than Executive Order 12549. Supplier certifies that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation by any federal department or agency.

vii) **BYRD ANTI-LOBBYING AMENDMENT, AS AMENDED (31 U.S.C. § 1352).** Suppliers must file any required certifications. Suppliers must not have used federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any federal contract, grant, or any other award covered by 31 U.S.C. § 1352. Suppliers must disclose any lobbying with non-federal funds that takes place in connection with obtaining any federal award. Such disclosures are forwarded from tier to tier up to the non-federal award. Suppliers must file all certifications and disclosures required by, and otherwise comply with, the Byrd Anti-Lobbying Amendment (31 U.S.C. § 1352).

viii) **RECORD RETENTION REQUIREMENTS.** To the extent applicable, Supplier must comply with the record retention requirements detailed in 2 C.F.R. § 200.333. The Supplier further certifies that it will retain all records as required by 2 C.F.R. § 200.333 for a period of 3 years after grantees or subgrantees submit final expenditure reports or quarterly or annual financial reports, as applicable, and all other pending matters are closed.

ix) **ENERGY POLICY AND CONSERVATION ACT COMPLIANCE.** To the extent applicable, Supplier must comply with the mandatory standards and policies relating to energy efficiency which are contained in the state energy conservation plan issued in compliance with the Energy Policy and Conservation Act.

x) **BUY AMERICAN PROVISIONS COMPLIANCE.** To the extent applicable, Supplier must comply with all applicable provisions of the Buy American Act. Purchases made in accordance with the Buy American Act must follow the applicable procurement rules calling for free and open competition.

xi) **ACCESS TO RECORDS (2 C.F.R. § 200.336).** Supplier agrees that duly authorized representatives of a federal agency must have access to any books, documents, papers and records of Supplier that are directly pertinent to Supplier's discharge of its obligations under this Agreement for the purpose of making audits, examinations, excerpts, and transcriptions. The right also includes timely and reasonable access to Supplier's personnel for the purpose of interview and discussion relating to such documents.

xii) **PROCUREMENT OF RECOVERED MATERIALS (2 C.F.R. § 200.322).** A non-federal entity that is a state agency or agency of a political subdivision of a state and its contractors must comply with Section 6002 of the Solid Waste Disposal Act, as amended by the Resource Conservation and Recovery Act. The requirements of Section 6002 include procuring only items designated in guidelines of the Environmental Protection Agency (EPA) at 40 C.F.R. § 247 that contain the highest percentage of recovered materials practicable, consistent with maintaining a satisfactory level of competition, where the purchase price of the item exceeds \$10,000 or the value of the quantity acquired during the preceding fiscal year exceeded \$10,000; procuring solid waste management services in a manner that maximizes energy and resource recovery; and establishing an affirmative procurement program for procurement of recovered materials identified in the EPA guidelines.

xiii) **FEDERAL SEAL(S), LOGOS, AND FLAGS.** The Supplier cannot use the seal(s), logos, crests, or reproductions of flags or likenesses of Federal agency officials without specific pre-approval.

xiv) **NO OBLIGATION BY FEDERAL GOVERNMENT.** The U.S. federal government is not a party to this Agreement or any purchase by a Participating Entity and is not subject to any obligations or liabilities to the Participating Entity, Supplier, or any other party pertaining to any matter resulting from the Agreement or any purchase by an authorized user.

xv) **PROGRAM FRAUD AND FALSE OR FRAUDULENT STATEMENTS OR RELATED ACTS.** The Contractor acknowledges that 31 U.S.C. § 38 (Administrative Remedies for False Claims and Statements) applies to the Supplier's actions pertaining to this Agreement or any purchase by a Participating Entity.

xvi) **FEDERAL DEBT.** The Supplier certifies that it is non-delinquent in its repayment of any federal debt. Examples of relevant debt include delinquent payroll and other taxes, audit disallowance, and benefit overpayments.

xvii) **CONFLICTS OF INTEREST.** The Supplier must notify the U.S. Office of General Services, Sourcewell, and Participating Entity as soon as possible if this Agreement or any aspect related to the anticipated work under this Agreement raises an actual or potential conflict of interest (as described in 2 C.F.R. Part 200). The Supplier must explain the actual or potential conflict in writing in sufficient detail so that the U.S. Office of General Services, Sourcewell, and Participating Entity are able to assess the actual or potential conflict; and provide any additional information as necessary or requested.

xviii) **U.S. EXECUTIVE ORDER 13224.** The Supplier, and its subcontractors, must comply with U.S. Executive Order 13224 and U.S. Laws that prohibit transactions with and provision of resources and support to individuals and organizations associated with terrorism.



xix) **PROHIBITION ON CERTAIN TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT.** To the extent applicable, Supplier certifies that during the term of this Agreement it will comply with applicable requirements of 2 C.F.R. § 200.216.

xx) **DOMESTIC PREFERENCES FOR PROCUREMENTS.** To the extent applicable, Supplier certifies that during the term of this Agreement, Supplier will comply with applicable requirements of 2 C.F.R. § 200.322.

## **Article 2: Sourcewell and Supplier Obligations**

The Terms in this Article 2 relate specifically to Sourcewell and its administration of this Master Agreement with Supplier and Supplier's obligations thereunder.

- 1) **Authorized Sellers.** Supplier must provide Sourcewell a current means to validate or authenticate Supplier's authorized dealers, distributors, or resellers which may complete transactions of Included Solutions offered under this Agreement. Sourcewell may request updated information in its discretion, and Supplier agrees to provide requested information within a reasonable time.
- 2) **Product and Price Changes Requirements.** Supplier may request Included Solutions changes, additions, or deletions at any time. All requests must be made in writing by submitting a Sourcewell Price and Product Change Request Form to Sourcewell. At a minimum, the request must:
  - Identify the applicable Sourcewell Agreement number;
  - Clearly specify the requested change;
  - Provide sufficient detail to justify the requested change;
  - Individually list all Included Solutions affected by the requested change, along with the requested change (e.g., addition, deletion, price change); and
  - Include a complete restatement of Pricing List with the effective date of the modified pricing, or product addition or deletion. The new pricing restatement must include all Included Solutions offered, even for those items where pricing remains unchanged.

A fully executed Sourcewell Price and Product Change Request Form will become an amendment to this Agreement and will be incorporated by reference.

- 3) **Authorized Representative.** Supplier will assign an Authorized Representative to Sourcewell for this Agreement and must provide prompt notice to Sourcewell if that person is changed. The Authorized Representative will be responsible for:
  - Maintenance and management of this Agreement;
  - Timely response to all Sourcewell and Participating Entity inquiries; and
  - Participation in reviews with Sourcewell.

Sourcewell's Authorized Representative is its Chief Procurement Officer.

- 4) **Performance Reviews.** Supplier will perform a minimum of one review with Sourcewell per agreement year. The review will cover transactions to Participating Entities, pricing and terms, administrative fees, sales data reports, performance issues, supply chain issues, customer issues, and any other necessary information.

- 5) **Sales Reporting Required.** Supplier is required as a material element to this Master Agreement to report all completed transactions with Participating Entities utilizing this Agreement. Failure to provide complete and accurate reports as defined herein will be a material breach of the Agreement and Sourcewell reserves the right to pursue all remedies available at law including cancellation of this Agreement.
- 6) **Reporting Requirements.** Supplier must provide Sourcewell an activity report of all transactions completed utilizing this Agreement. Reports are due at least once each calendar quarter (Reporting Period). Reports must be received no later than 45 calendar days after the end of each calendar quarter. Supplier may report on a more frequent basis in its discretion. Reports must be provided regardless of the amount of completed transactions during that quarter (i.e., if there are no sales, Supplier must submit a report indicating no sales were made).

The Report must contain the following fields:

- Participating Entity Name (e.g., City of Staples Highway Department);
- Participating Entity Physical Street Address;
- Participating Entity City;
- Participating Entity State/Province;
- Participating Entity Zip/Postal Code;
- Sourcewell Participating Entity Account Number;
- Transaction Description;
- Transaction Purchased Price;
- Sourcewell Administrative Fee Applied; and
- Date Transaction was invoiced/sale was recognized as revenue by Supplier.

If collected by Supplier, the Report may include the following fields as available:

- Participating Entity Contact Name;
- Participating Entity Contact Email Address;
- Participating Entity Contact Telephone Number;

- 7) **Administrative Fee.** In consideration for the support and services provided by Sourcewell, Supplier will pay a one percent (1%) Administrative Fee to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. Supplier will include its Administrative Fee within its proposed pricing. Supplier may not directly charge Participating Entities to offset the Administrative Fee.
- 8) **Fee Calculation.** Supplier's Administrative Fee payable to Sourcewell will be calculated as a stated percentage (listed in Supplier's Proposal) of all completed transactions utilizing this Master Agreement within the preceding Reporting Period. For certain categories, a flat fee may be proposed. The Administrative Fee will be stated in Supplier's Proposal.
- 9) **Fee Remittance.** Supplier will remit fee to Sourcewell no later than 45 calendar days after the close of the preceding calendar quarter in conjunction with Supplier's Reporting Period obligations defined herein. Payments should note the Supplier's name and Sourcewell-assigned Agreement number in the memo; and must be either mailed to Sourcewell above "Attn: Accounts Receivable" or remitted electronically to Sourcewell's banking institution per Sourcewell's Finance department instructions.



- 10) **Noncompliance.** Sourcewell reserves the right to seek all remedies available at law for unpaid or underpaid Administrative Fees due under this Agreement. Failure to remit payment, delinquent payments, underpayments, or other deviations from the requirements of this Agreement may be deemed a material breach and may result in cancellation of this Agreement and disbarment from future Agreements.
- 11) **Audit Requirements.** Pursuant to Minn. Stat. § 16C.05, subdivision 5, the books, records, documents, and accounting procedures and practices relevant to this Agreement are subject to examination by Sourcewell and the Minnesota State Auditor for a minimum of six years from the end of this Agreement. Supplier agrees to fully cooperate with Sourcewell in auditing transactions under this Agreement to ensure compliance with pricing terms, correct calculation and remittance of Administrative Fees, and verification of transactions as may be requested by a Participating Entity or Sourcewell.
- 12) **Assignment, Transfer, and Administrative Changes.** Supplier may not assign or otherwise transfer its rights or obligations under this Agreement without the prior written consent of Sourcewell. Such consent will not be unreasonably withheld. Sourcewell reserves the right to unilaterally assign all or portions of this Agreement within its sole discretion to address corporate restructurings, mergers, acquisitions, or other changes to the Responsible Party and named in the Agreement. Any prohibited assignment is invalid. Upon request Sourcewell may make administrative changes to agreement documentation such as name changes, address changes, and other non-material updates as determined within its sole discretion.
- 13) **Amendments.** Any material change to this Agreement must be executed in writing through an amendment and will not be effective until it has been duly executed by the parties.
- 14) **Waiver.** Failure by Sourcewell to enforce any right under this Agreement will not be deemed a waiver of such right in the event of the continuation or repetition of the circumstances giving rise to such right.
- 15) **Complete Agreement.** This Agreement represents the complete agreement between the parties for the scope as defined herein. Supplier and Sourcewell may enter into separate written agreements relating specifically to transactions outside of the scope of this Agreement.
- 16) **Relationship of Sourcewell and Supplier.** This Agreement does not create a partnership, joint venture, or any other relationship such as employee, independent contractor, master-servant, or principal-agent.
- 17) **Indemnification.** Supplier must indemnify, defend, save, and hold Sourcewell, including their agents and employees, harmless from any claims or causes of action, including attorneys' fees incurred by Sourcewell, arising out of any act or omission in the performance of this Agreement by the Supplier or its agents or employees; this indemnification includes injury or death to person(s) or property alleged to have been caused by some defect in design, condition, or performance of Included Solutions under this Agreement. Sourcewell's responsibility will be governed by the State of Minnesota's Tort Liability Act (Minnesota Statutes Chapter 466) and other applicable law.

18) **Data Practices.** Supplier and Sourcewell acknowledge Sourcewell is subject to the Minnesota Government Data Practices Act, Minnesota Statutes Chapter 13. As it applies to all data created and maintained in performance of this Agreement, Supplier may be subject to the requirements of this chapter.

19) **Grant of License.**

a) **During the term of this Agreement:**

i) **Supplier Promotion.** Sourcewell grants to Supplier a royalty-free, worldwide, non-exclusive right and license to use the trademark(s) provided to Supplier by Sourcewell in advertising, promotional materials, and informational sites for the purpose of marketing Sourcewell's Agreement with Supplier.

ii) **Sourcewell Promotion.** Supplier grants to Sourcewell a royalty-free, worldwide, non-exclusive right and license to use Supplier's trademarks in advertising, promotional materials, and informational sites for the purpose of marketing Supplier's Agreement with Sourcewell.

b) **Limited Right of Sublicense.** The right and license granted herein includes a limited right of each party to grant sublicenses to their respective subsidiaries, distributors, dealers, resellers, marketing representatives, partners, or agents (collectively "Permitted Sublicensees") in advertising, promotional, or informational materials for the purpose of marketing the Parties' relationship. Any sublicense granted will be subject to the terms and conditions of this Article. Each party will be responsible for any breach of this section by any of their respective sublicensees.

c) **Use; Quality Control.**

i) Neither party may alter the other party's trademarks from the form provided and must comply with removal requests as to specific uses of its trademarks or logos.

ii) Each party agrees to use, and to cause its Permitted Sublicensees to use, the other party's trademarks only in good faith and in a dignified manner consistent with such party's use of the trademarks. Each party may make written notice to the other regarding misuse under this section. The offending party will have 30 days of the date of the written notice to cure the issue or the license/sublicense will be terminated.

d) **Termination.** Upon the termination of this Agreement for any reason, each party, including Permitted Sublicensees, will have 30 days to remove all Trademarks from signage, websites, and the like bearing the other party's name or logo (excepting Sourcewell's pre-printed catalog of suppliers which may be used until the next printing). Supplier must return all marketing and promotional materials, including signage, provided by Sourcewell, or dispose of it according to Sourcewell's written directions.

20) **Venue and Governing law between Sourcewell and Supplier Only.** The substantive and procedural laws of the State of Minnesota will govern this Agreement between Sourcewell and Supplier. Venue for all legal proceedings arising out of this Agreement between Sourcewell and Supplier will be in court of competent jurisdiction within the State of Minnesota. This section does not apply to any dispute between Supplier and Participating Entity. This Agreement reserves the right for Supplier and Participating Entity to negotiate this term to within any transaction documents.

- 21) **Severability.** If any provision of this Agreement is found by a court of competent jurisdiction to be illegal, unenforceable, or void then both parties will be relieved from all obligations arising from that provision. If the remainder of this Agreement is capable of being performed, it will not be affected by such determination or finding and must be fully performed.
- 22) **Insurance Coverage.** At its own expense, Supplier must maintain valid insurance policy(ies) during the performance of this Agreement with insurance company(ies) licensed or authorized to do business in the State of Minnesota having an “AM BEST” rating of A- or better, with coverage and limits of insurance not less than the following:
- a) **Commercial General Liability Insurance.** Supplier will maintain insurance covering its operations, with coverage on an occurrence basis, and must be subject to terms no less broad than the Insurance Services Office (“ISO”) Commercial General Liability Form CG0001 (2001 or newer edition), or equivalent. At a minimum, coverage must include liability arising from premises, operations, bodily injury and property damage, independent contractors, products-completed operations including construction defect, contractual liability, blanket contractual liability, and personal injury and advertising injury. All required limits, terms and conditions of coverage must be maintained during the term of this Agreement.
    - \$1,500,000 each occurrence Bodily Injury and Property Damage
    - \$1,500,000 Personal and Advertising Injury
    - \$2,000,000 aggregate for products liability-completed operations
    - \$2,000,000 general aggregate
  - b) **Certificates of Insurance.** Prior to execution of this Agreement, Supplier must furnish to Sourcewell a certificate of insurance, as evidence of the insurance required under this Agreement. Prior to expiration of the policy(ies), renewal certificates must be mailed to Sourcewell, 202 12th Street Northeast, P.O. Box 219, Staples, MN 56479 or provided to in an alternative manner as directed by Sourcewell. The certificates must be signed by a person authorized by the insurer(s) to bind coverage on their behalf. Failure of Supplier to maintain the required insurance and documentation may constitute a material breach.
  - c) **Additional Insured Endorsement and Primary and Non-contributory Insurance Clause.** Supplier agrees to list Sourcewell, including its officers, agents, and employees, as an additional insured under the Supplier’s commercial general liability insurance policy with respect to liability arising out of activities, “operations,” or “work” performed by or on behalf of Supplier, and products and completed operations of Supplier. The policy provision(s) or endorsement(s) must further provide that coverage is primary and not excess over or contributory with any other valid, applicable, and collectible insurance or self-insurance in force for the additional insureds.
  - d) **Waiver of Subrogation.** Supplier waives and must require (by endorsement or otherwise) all its insurers to waive subrogation rights against Sourcewell and other additional insureds for losses paid under the insurance policies required by this Agreement or other insurance applicable to the Supplier or its subcontractors. The waiver must apply to all deductibles and/or self-insured retentions applicable to the required or any other insurance maintained by the Supplier or its subcontractors. Where permitted by law, Supplier must require similar written express waivers of subrogation and insurance clauses from each of its subcontractors.

- e) **Umbrella/Excess Liability/SELF-INSURED RETENTION.** The limits required by this Agreement can be met by either providing a primary policy or in combination with umbrella/excess liability policy(ies), or self-insured retention.
- 23) **Termination for Convenience.** Sourcewell or Supplier may terminate this Agreement upon 60 calendar days' written notice to the other Party. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.
- 24) **Termination for Cause.** Sourcewell may terminate this Agreement upon providing written notice of material breach to Supplier. Notice must describe the breach in reasonable detail and state the intent to terminate the Agreement. Upon receipt of Notice, the Supplier will have 30 calendar days in which it must cure the breach. Termination pursuant to this section will not relieve the Supplier's obligations under this Agreement for any transactions entered with Participating Entities through the date of termination, including reporting and payment of applicable Administrative Fees.

### **Article 3: Supplier Obligations to Participating Entities**

The Terms in this Article 3 relate specifically to Supplier and a Participating Entity when entering transactions utilizing the General Terms established in this Master Agreement. Article 1 General Terms control over any conflict with this Article 3. Where this Master Agreement is silent on any subject, Participating Entity and Supplier retain the ability to negotiate mutually acceptable terms.

- 1) **Quotes to Participating Entities.** Suppliers are encouraged to provide all pricing information regarding the total cost of acquisition when quoting to a Participating Entity. Suppliers and Participating Entities are encouraged to include all cost specifically associated with or included within the Suppliers proposal and Included Solutions within transaction documents.
- 2) **Shipping, Delivery, Acceptance, Rejection, and Warranty.** Supplier's proposal may include proposed terms relating to shipping, delivery, inspection, and acceptance/rejection and other relevant terms of tendered Solutions. Supplier and Participating Entity may negotiate final terms appropriate for the specific transaction relating to non-appropriation, shipping, delivery, inspection, acceptance/rejection of tendered Solutions, and warranty coverage for Included Solutions. Such terms may include, but are not limited to, costs, risk of loss, proper packaging, inspection rights and timelines, acceptance or rejection procedures, and remedies as mutually agreed include notice requirements, replacement, return or exchange procedures, and associated costs.
- 3) **Applicable Taxes.** Participating Entity is responsible for notifying supplier of its tax-exempt status and for providing Supplier with any valid tax-exemption certification(s) or related documentation.
- 4) **Ordering Process and Payment.** Supplier's ordering process and acceptable forms of payment are included within its Proposal. Participating Entities will be solely responsible for payment to Supplier and Sourcewell will have no liability for any unpaid invoice of any Participating Entity.
- 5) **Transaction Documents.** Participating Entity may require the use of its own forms to complete transactions directly with Supplier utilizing the terms established in this Agreement. Supplier's

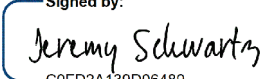
standard form agreements may be offered as part of its Proposal. Supplier and Participating Entity may complete and document transactions utilizing any type of transaction documents as mutually agreed. In any transaction document entered utilizing this Agreement, Supplier and Participating Entity must include specific reference to this Master Agreement by number and to Participating Entity’s unique Sourcewell account number.

- 6) **Additional Terms and Conditions Permitted.** Participating Entity and Supplier may negotiate and include additional terms and conditions within transaction documentation as mutually agreed. Such terms may supplant or supersede this Master Agreement when necessary and as solely determined by Participating Entity. Sourcewell has expressly reserved the right for Supplier and Participating Entity to address any necessary provisions within transaction documents not expressly included within this Master Agreement, including but not limited to transaction cancellation, dispute resolution, governing law and venue, non-appropriation, insurance, defense and indemnity, force majeure, and other material terms as mutually agreed.
- 7) **Subsequent Agreements and Survival.** Supplier and Participating Entity may enter into a separate agreement to facilitate long-term performance obligations utilizing the terms of this Master Agreement as mutually agreed. Such agreements may provide for a performance period extending beyond the full term of this Master Agreement as determined in the discretion of Participating Entity.
- 8) **Participating Addendums.** Supplier and Participating Entity may enter a Participating Addendum or similar document extending and supplementing the terms of this Master Agreement to facilitate adoption as may be required by a Participating Entity.

Sourcewell

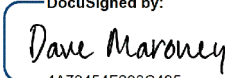
Armstrong Torseth Skold and Rydeen, Inc.

Signed by:

  
C0FD2A139D06489...

By: \_\_\_\_\_  
Jeremy Schwartz  
Title: Chief Procurement Officer  
Date: 1/6/2025 | 9:29 PM CST

DocuSigned by:

  
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By: \_\_\_\_\_  
David A. Maroney  
Title: President  
Date: 1/6/2025 | 4:19 PM CST

# RFP 102424 - Facility Assessment and Planning

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## Vendor Details

Company Name: Armstrong Torseth Skold and Rydeen, Inc.

Does your company conduct business under any other name? If yes, please state: ATSR Planners Architects Engineers

Address: 8501 Golden Valley Road  
Suite 300  
Minneapolis, MN 55427

Contact: Jeremy Scheller

Email: jscheller@atsr.com

Phone: 763-525-3209

Fax: 763-545-3731

HST#: 410771257

## Submission Details

Created On: Thursday September 05, 2024 06:53:26

Submitted On: Wednesday October 23, 2024 15:40:34

Submitted By: Paul Erickson

Email: perickson@atsr.com

Transaction #: cb343537-addb-4b69-8ae5-6967e6b30dea

Submitter's IP Address: 107.0.25.35

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## Specifications

**Table 1: Proposer Identity & Authorized Representatives (Not Scored)**

**General Instructions** (applies to all Tables) Sourcewell prefers a brief but thorough response to each question. Do not merely attach additional documents to your response without also providing a substantive response. Do not leave answers blank; respond “N/A” if the question does not apply to you (preferably with an explanation).

Table 1 Specific Instructions. Sourcewell requires identification of all parties responsible for providing Solutions under a resulting master agreement(s) (Responsible Supplier). Proposers are strongly encouraged to include all potential Responsible Suppliers including any corporate affiliates, subsidiaries, D.B.A., and any other authorized entities within a singular proposal. All information required under this RFP must be included for each Responsible Supplier as instructed. Proposers with multiple Responsible Supplier options may choose to respond individually as distinct entities, however each response will be evaluated individually and only those proposals recommended for award may result in a master agreement award. Unawarded entities will not be permitted to later be added to an existing master agreement through operation of Proposer’s corporate organization affiliation.

Line Item	Question	Response *	
1	Provide the legal name of the Proposer authorized to submit this Proposal.	Armstrong, Torseth, Skold, & Rydeen, Inc. (ATSR Planners/Architects/Engineers)	*
2	In the event of award, is this entity the Responsible Supplier that will execute the master agreement with Sourcewell? Y or N.	Y	*
3	Identify all subsidiaries, D.B.A., authorized affiliates, and any other entity that will be responsible for offering and performing delivery of Solutions within this Proposal (i.e. Responsible Supplier(s) that will execute a master agreement with Sourcewell).	N/A. ATSR is the Responsible Supplier that will execute a master agreement with Sourcewell. ATSR may have special consultants depending on scope of work, but those consultants (e.g., structural engineering and civil engineering disciplines) will be under ATSR.	*
4	Provide your CAGE code or Unique Entity Identifier (SAM):	UEI: PS6DZ96G8H77 Cage: 0K3Z4	*
5	Provide your NAICS code applicable to Solutions proposed.	ATSR does not have a NAICS code.	
6	Proposer Physical Address:	8501 Golden Valley Road, Suite 300 Minneapolis, MN 55427	*
7	Proposer website address (or addresses):	www.atsr.com	*
8	Proposer's Authorized Representative (name, title, address, email address & phone) (The representative must have authority to sign the “Proposer’s Assurance of Compliance” on behalf of the Proposer):	David M. Maroney, AIA   NCARB ATSR President 8501 Golden Valley Road, Suite 300 Minneapolis, MN 55427 dmaroney@atsr.com 763.525.5643	*
9	Proposer's primary contact for this proposal (name, title, address, email address & phone):	Jeremy Scheller, Marketing Manager ATSR 8501 Golden Valley Road, Suite 300 Minneapolis, MN 55427 jscheller@atsr.com 763.525.3209	*
10	Proposer's other contacts for this proposal, if any (name, title, address, email address & phone):	Eric Anderson, AIA/NCARB ATSR 8501 Golden Valley Road, Suite 300 Minneapolis, MN 55427 jscheller@atsr.com 763.525.3270	

**Table 2A: Financial Viability and Marketplace Success (50 Points)**

Line Item	Question	Response *	
11	Provide a brief history of your company, including your company's core values, business philosophy, and industry longevity related to the requested Solutions.	FIRM INFORMATION ATSR Planners   Architects   Engineers 8501 Golden Valley Road, Suite 300 Minneapolis, Minnesota 55427 David Maroney, AIA   NCARB	

ATSR President  
dmaroney@atsr.com | 763.525.3226

ATSR is a nationally recognized, multi-disciplinary planning, architectural, and engineering firm specializing in planning, assessing, designing, and engineering PreK-12 school facilities and municipal/civic facilities. Founded in 1944, ATSR is a Minnesota registered "S" corporation and is privately held by active partners in the firm. We are celebrating 80 years of continuous operation as a firm. ATSR is proud to successfully provide long-term relationships with public school districts, governmental agencies, and private schools, some for more than 73 years.

ATSR, headquartered in Minneapolis, Minnesota, has 51 full-time staff members including professionally licensed architects, engineers, landscape architects, and interior designers. Our full-time staff also includes Recognized Educational Facility Planners (REFP), educational planners, senior design and construction documents technicians, technology designers (i.e., voice, data, video, security, infrastructure), food service design specialists, specification writers, architectural designers, 3D computer rendering modelers, engineering designers, energy modeler specialists, commissioning specialists, code/ADA specialists, architects-in-training, engineers-in-training, construction administrators, contracts specialists, managerial support, and marketing personnel.

#### EXPERIENCE

Over recent years ATSR has designed \$2+ billion of school and government construction, nationally and internationally. As PreK-12 school and municipal/civic specialists, 98% of our annual work is planning, assessing, and designing these types of facilities. ATSR's comprehensive in-house disciplines and a single-source of responsibility means dedicated support and exceptional service to our clients. Our 80 years of continuous service is a testimony to our values; our experience is your resource to provide successes exceeding our clients' expectations.

#### PHILOSOPHY

ATSR's philosophy is that a successful project enhances our clients' program/aesthetic needs, while adhering to budget/schedule requirements. Communication and user-group involvement are essential for a successful project. Design is an evolving process - a collaboration between the architect, building users, owners, and owner's representatives.

#### ATSR MISSION AND VISION

ATSR believes the following principles are key to our continued success:

- Dedication to honesty and integrity;
- Clear and open communication;
- Promotion of growth for all employees; and
- Respect for all team members.

Quality of work and service to ATSR clients is our company's primary objective. The key to quality and service, and the subsequent continued growth of ATSR, is with each of our employees. We are proud of the many fine people who have contributed to our success over the years. The special skills and knowledge of individuals are a welcomed addition to our team.

#### ATSR's Mission Is:

To serve as a valued partner to our clients, community, and profession through collaboration and communication,  
To provide quality and efficient professional services that revolve around integrity, fairness, and respect that enable the perpetuation of our firm.

#### ATSR's Vision Is...

... to create the greatest sense of satisfaction and betterment for our clients, staff, and profession ...  
... while producing the highest quality of architecture and engineering ...  
... and to serve as a model for others.

The high level of quality to which we have committed ourselves begins with the image we project as employees of ATSR. That is why employees are expected to conduct themselves in the highest professional and ethical manner in language, appearance, and behavior, and to maintain honesty, fairness, and confidentiality in all company matters.

Our first responsibility is to the clients we serve. To the best of our ability, we will provide them with this 'completeness and excellence' of service. On any given project, this service to our clients extends over many months or years and covers the planning, cost estimating, designing, contract documents, bidding, and contract administration of the project. This quality of service can only be rendered through the dedication and hard work of all ATSR employees. THE CLIENT IS EVERYTHING.

Our second responsibility is to encourage each of our employees to explore opportunities for their optimum development. This goal can be reached by assisting employees in identifying their individual capabilities, finding new challenges, and taking advantage of training programs and other opportunities to strengthen these individual capabilities. We believe that the 'completeness and excellence' of our professional service will foster growth for our company and add opportunities for the advancement of our people.

Our third responsibility is to conduct our business on a profitable basis so that our firm can continue in the future to provide exceptional services to our clients which, in turn, will benefit each of us. We believe that the profitability of our firm will result naturally from the proper discharge of our first two responsibilities and our efforts to strive for the goal of 'completeness and excellence' of our professional service.

ATSR also believes that our fourth responsibility is our corporate social responsibility to the greater community. We, therefore, encourage individual employee participation in community service, as well as community service through our corporate structure.

ATSR IN-HOUSE SERVICES

ATSR provides comprehensive services for your benefit as your single-source of responsibility. Our depth of experience and knowledge gives you the confidence of ATSR's single-point source with accountability.

ATSR provides in-house services as follows:

- Educational adequacy studies
- Facility analysis | Space utilization
- Facilities condition assessments
- Facilities master planning
- Pre-referendum planning/assistance
- Architecture
- Interior Design
- Forward-thinking future-ready design
- Educational facility planning
- Mechanical/Electrical/Plumbing engineering
- Technology design (voice | data | video | security | infrastructure)
- Landscape architecture
- Sustainability design | LEED design | Energy rebates processing
- Project management and scheduling
- Construction cost estimating | Project cost estimating
- Fixtures, Furniture, and Equipment (FF&E) design, specifications, and procurement
- Food service design
- Hardware design | Roof design
- Specifications for all disciplines noted above
- City/State agency approval management and processing
- Construction administration
- Punch-lists and warranty closeout services

ATSR'S CONSULTANTS

ATSR utilizes consultants that we have long-term relationships with for the following disciplines:

- Civil engineering
- Structural engineering
- Acoustical design

ATSR MANAGEMENT

David Maroney, AIA | NCARB  
President | Executive Officer\*; 40 years of experience

Dean Beeninga, AIA | NCARB | REFP | LEED  
Vice President | Executive Officer\*; 38 years of experience

Paul Erickson, AIA | NCARB | REFP  
Past President | Executive Officer\*\*; 47 years of experience

Sarah Fox, AIA | NCARB | LEED Associate  
Partner | Architecture\*; 25 years of experience

Blayne Parkos, PE | LEED AP BD+C  
Partner | Mechanical\*; 26 years of experience

Peter Lacey, RIBA | LEED AP BD+C  
Partner | Architecture\*; 25 years of experience

Nicholas Achina, PE  
Partner | Electrical; 33 years of experience

		<p>Eric Anderson, AIA   NCARB Partner   Architecture; 25 years of experience</p> <p>Nancy LaBissoniere, AIA   NCARB Partner   Architecture; 35 years of experience</p> <p>Kara Rise, IIDA   LEED AP ID+C Partner   Interiors; 18 years of experience</p> <p>Patrick Collins, PE Associate Partner   Mechanical; 15 years of experience</p> <p>Alex Wagner, PE Associate Partner   Mechanical; 8 years of experience</p> <p>John Jurichko, CDT Associate Partner   Foodservice; 37 years of experience</p> <p>Lynne Dahl Associate Partner   Construction; 20 years of experience</p> <p>Jeremy Scheller Associate Partner   Marketing; 19 years of experience</p> <p>* ATSR Board of Director ** Treasurer   ATSR Past Board of Director</p> <p>COMMITMENT TO EDUCATION ATSR is corporately committed to the education community. We are actively involved in professional education organizations and lead the way with new ideas and resources, serving as a valued partner to our clients. ATSR partners make presentations and author articles on school design issues at the state, national, and international levels. Our recent educational experience includes (partial listing):</p> <ul style="list-style-type: none"> <li>- 500+ major additions and alterations</li> <li>- 36 new elementary schools</li> <li>- 1000+ long term facilities maintenance projects</li> <li>- 500+ educational technology projects (voice, video, data, security, infrastructure)</li> <li>- 19 new middle/junior high schools</li> <li>- 29 new high schools</li> <li>- 12 PreK-12 schools</li> <li>- 3 K-8 schools &amp; 9 1-10 schools</li> <li>- 150+ facility assessments and long-range / educational facility planning studies</li> <li>- 17 district service centers</li> <li>- 150+ ADA surveys</li> <li>- 3 special education schools</li> <li>- 2 senior centers</li> <li>- 3 bus garages</li> <li>- 35 reroofing projects 35 sprinkler projects</li> </ul>
12	What are your company's expectations in the event of an award?	<p>ATSR has actively positioned our firm to engage with Sourcewell to provide services as needed for clients. Upon award of work, ATSR will meet with Sourcewell professionals to refine specific details required by Sourcewell, finalize contract arrangements, and prepare for project implementation.</p> <p>ATSR actively recruits highly qualified professional staff and promises to provide the appropriate number of staff for the Sourcewell client projects. ATSR understands the degree of professionalism and high standard of deliverables required for Sourcewell clients, since many of our clients already utilize and have access to Sourcewell contracting. 98% of our work annually is PreK-12 public education, governmental, and municipal/civic projects.</p> <p>Since ATSR has extensive experience regionally, nationally, and internationally, we understand the initial steps needed to define scope, budget, pricing, and deliverables for clients. We have attended webinars and seminars for contracting services and are ready to commence on work awarded immediately.</p> <p>ATSR management has identified the key team members who will actively work on projects awarded. For your projects, an ATSR owner of the firm is actively involved in operations and project management and will engage immediately in refining the project parameters for a 'best fit' for the client.</p>

13	Demonstrate your financial strength and stability with meaningful data. This could include such items as financial statements, SEC filings, credit and bond ratings, letters of credit, and detailed reference letters. Upload supporting documents (as applicable) in the document upload section of your response. DO NOT PROVIDE ANY TAX INFORMATION OR PERSONALLY IDENTIFIABLE INFORMATION.	<p>ATSR was founded in 1944 and is enjoying 80 years of continuous operation as a planning, assessment, architectural, and engineering firm with central headquarters in Minneapolis, Minnesota.</p> <p>ATSR currently banks with Wells Fargo Bank (for 30+ years) and Security Bank &amp; Trust Co. (for four years). Please see the uploaded letter(s) of financial strength and stability from the banks ATSR uses. ATSR had never had a line of credit from a bank until COVID, which was opened in 2020 with Security Bank &amp; Trust Co. for \$1.5 million. Currently, borrowing against this line of credit is zero (-\$0-).</p> <p>ATSR has an Employer Profit Sharing Plan (since 1966) and has contributed to the Plan for 45 consecutive years through 2023 to our employees' retirement. We also provide a 401K Plan for employees to contribute to.</p> <p>For 45+ years, ATSR's accountant CLA (Clifton Larson Associates LLP) prepares ATSR corporate and partner tax returns.</p>	*
14	What is your US market share for the Solutions that you are proposing?	<p>For 80 years ATSR has provided professional services to public school districts and other governmental agencies. 98% of ATSR's work annually is with school districts and governmental agencies for planning, assessment, architectural, and engineering services.</p> <p>ATSR is nationally and internationally recognized in the PreK-12 public school market. From our headquarters in Minneapolis, Minnesota, we have planned, assessed, and designed numerous projects for various-sized school districts in Minnesota, Wisconsin, North Dakota, South Dakota, Illinois, Indiana, Colorado, Pennsylvania, Alaska, and Arkansas, including facilities conditions assessments, facilities planning, new schools, and additions/remodeling/maintenance projects. ATSR worked for the Department of Interior Bureau of Indian Affairs (DOI-BIA) in assessing conditions of hundreds of school facilities on reservations throughout 40+ States in the U.S.</p> <p>Internationally, ATSR started serving the United States Agency for International Development (USAID) in 2006 to current for designing 90+ new public schools for the Hashemite Kingdom of Jordan; ATSR has designed other education projects in Saudi Arabia and Kuwait.</p> <p>ATSR believes that we best serve the client from our central Minneapolis headquarters to virtually anywhere in the U.S. and extending overseas with local partners. Air travel is a way of life for our highly qualified professional staff. Our experience/knowledge is your resource.</p> <p>ATSR is highly regarded in the U.S. PreK-12 education market segment; ATSR firm owners author articles regularly for national education magazines including American School &amp; University Magazine. Our firm owners are frequent presenters at national education conferences and have presented at EDSpaces, Association For learning Environments (A4LE), AASA, NSBA, and others.</p>	*
15	What is your Canadian market share for the Solutions that you are proposing?	N/A. ATSR has not provided professional services in Canada, but we are very interested in starting to serve clients in Canada. Located in Minnesota with the Delta Airlines hub provides for easy traveling to areas in Canada. We have served northern Minnesota areas including Thief River Falls, Duluth, Grand Portage, and others.	*
16	Disclose all current and completed bankruptcy proceedings for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcwell if it enters a bankruptcy proceeding at any time during the pendency of this RFP evaluation.	ATSR has no bankruptcy history or filing. ATSR is celebrating 80 years of continuous operations.	*

17	<p>How is your organization best described: is it a manufacturer, a distributor/dealer/reseller, or a service provider? Answer the question that best applies to your organization, either a) or b).</p> <p>a) If your company is best described as a distributor/dealer/reseller (or similar entity), provide your written authorization to act as a distributor/dealer/reseller for the manufacturer of the products proposed in this RFP. If applicable, is your dealer network independent or company owned?</p> <p>b) If your company is best described as a manufacturer or service provider, describe your relationship with your sales and service force and with your dealer network in delivering the products and services proposed in this RFP. Are these individuals your employees, or the employees of a third party?</p>	<p>ATSR is a service provider.</p> <p>Question a) N/A. ATSR provides professional services.</p> <p>Question b) ATSR's sales and services forces are ATSR employees, which include ATSR's firm owners, design and technical staff, and marketing manager. ATSR's team seeks out projects and clients, does the actual proposal writing, performs the actual interviews and presentations, negotiates the final terms of the contract agreement, and provides the services required.</p> <p>ATSR does utilize consultants for certain disciplines, typically structural engineers, acoustical designers, civil engineers, and demographics specialists. Otherwise, ATSR delivers comprehensive services with in-house disciplines.</p>	*
18	<p>If applicable, provide a detailed explanation outlining the licenses and certifications that are both required to be held, and actually held, by your organization (including third parties and subcontractors that you use) in pursuit of the business contemplated by this RFP.</p>	<p>ATSR is an 'S' Corporation licensed to practice in Minnesota and other states as required per individual project. ATSR is a professional services planning, assessment, architectural, and engineering firm with in-house licensed architects, landscape architects, mechanical engineers, and electrical engineers.</p> <p>For each state in which we work, our professionals obtain the licenses required to perform the work and sign documents. Our architects are members of NCARB (National Council of Architectural Registration Boards) which permits quick licensing reciprocity between states in the U.S. Our engineers work through various national clearinghouses and state agencies to easily receive licenses in the states needed for a particular project. ATSR professionals hold licenses in Minnesota, North Dakota, South Dakota, Illinois, Wisconsin, Indiana, Pennsylvania, Arizona, Florida, and others. Continuing education for licensure is maintained by ATSR for all its licensed professionals. ATSR staff specialists also hold the credential REFP (Recognized Educational Facility Planner), which is important for PreK-12 educational planning and assessment projects.</p> <p>Our structural engineering consultants and civil engineering consultants hold the necessary professional engineering licenses to perform services in the states needed. Our acoustical consultant and demographics consultant hold licensing required to perform serves in the U.S.</p>	*
19	<p>Disclose all current and past debarments or suspensions for Proposer and any included possible Responsible Party within the past seven years. Proposer must provide notice in writing to Sourcewell if it enters a debarment or suspension status any time during the pendency of this RFP evaluation.</p>	<p>ATSR has not been subject to any "Suspension or Debarment" action in the last seven years.</p>	*



20	Describe any relevant industry awards or recognition that your company has received in the past five years.	<p>ATSR is recognized as an award-winning firm for PreK-12 education designs. Our projects are nationally recognized for outstanding designs that enhance student learning. Here is a partial listing of design awards we have received for our clients in the past five years:</p> <p>Minnetonka High School - Momentum Design/Skilled Trades, Minnetonka Public Schools, Minnetonka, MN 2023 Learning By Design (LBD), Excellence Award, "Outstanding Project - HS Voc-Ed"</p> <p>2023 American School &amp; University, Educational (AS&amp;U) Interiors Showcase, "Outstanding Design - Vocational Areas"</p> <p>North Branch District Education Center, North Branch Public Schools, North Branch, MN 2023 AS&amp;U, Educational Interiors Showcase, "Outstanding Design - PreK Education"</p> <p>Peter Hobart Elementary School / St. Louis Park Public Schools / St. Louis Park, MN 2022 LBD, Awards of Excellence - Fall 2022, "Outstanding Project - STEAM Center"</p> <p>Cathedral High School / Catholic Community Schools / St. Cloud, MN 2022 LBD, Awards of Excellence - Fall 2022, "Outstanding Project - STEAM Center" 2022 AS&amp;U, Educational Interiors Showcase, "Outstanding Design - STEAM Center"</p> <p>Tri-City United High School / Tri-City United Public Schools / Montgomery, MN 2021 LBD, Educational Showcase Fall Edition, "Outstanding Project"</p> <p>Minnetonka High School 'The Loft' /Minnetonka Public Schools / Minnetonka, MN "Grand Prize"; 2020 LBD, Architectural and Interior Design Awards of Excellence, Renovation / Adaptive Reuse / Restoration 2020 AS&amp;U, Educational Interiors Showcase, "Outstanding Design Interior Renovation"</p> <p>Rushford-Peterson EC-12 School / Rushford-Peterson School District / Rushford, MN 2019 AS&amp;U, Educational Interiors Showcase, "Outstanding Design" 2019 School Planning &amp; Mgt, Education Design Showcase, "Project of Distinction" 2019 LBD, Educational Showcase Spring Edition, "Outstanding Project"</p> <p>Kasson-Mantorville High School / Kasson-Mantorville Public Schools / Kasson, MN 2018 AS&amp;U, Educational Showcase, "Citation" 2018 LBD, Educational Showcase Fall Edition, "Outstanding Project" 2018 AS&amp;U, Educational Interiors Showcase, "Outstanding Design"</p> <p>Burnsville High School / Burnsville-Eagan-Savage School District / Burnsville, MN 2018 LBD, Educational Spring Edition, "Outstanding Project"</p>	*
21	What percentage of your sales are to the governmental sector in the past three years?	For Fiscal Year 2021, 2022, and 2023, ATSR's governmental sector work is 1% of our total revenue.	*
22	What percentage of your sales are to the education sector in the past three years?	For Fiscal Year 2021, 2022, and 2023, ATSR's education sector work is 98% of our total revenue.	*
23	List all state, cooperative purchasing agreements that you hold. What is the annual sales volume for each of these agreement over the past three years?	ATSR does not hold any state, provincial, or cooperative purchasing contracts.	*
24	List any GSA contracts or Standing Offers and Supply Arrangements (SOSA) that you hold. What is the annual sales volume for each of these contracts over the past three years?	ATSR does not hold any GSA contracts or Standing Offers and Supply Arrangements (SOSA).	*

**Table 2B: References/Testimonials**

**Line Item 25.** Supply reference information from three customers who are eligible to be Sourcewell participating entities.

Entity Name *	Contact Name *	Phone Number *	
Minnetonka Public Schools 5621 Country Road 101 Minnetonka, MN 55345	Paul Bourgeois, Exec. Director of Finance & Operations, paul.bourgeois@minnetonkaschools.org	952.401.5024	*
Anoka - Hennepin School District 2727 N. Ferry Street Anoka, MN 55303	Greg Cole, Chief Operations Officer greg.cole@ahschools.us	763.506.1175	*
Chippewa Falls Area Unified School District 1130 Miles Street Chippewa Falls, WI 54729	Chad Trowbridge, Executive Director of Business Services & Finance, trowbrcm@chipfalls.org	715.726.2417	*
City of Northfield 801 Washington Street Northfield, Minnesota 55057	Ben Martig, City Administrator Ben.Martig@ci.northfield.mn.us	507.645.3060	

**Table 3: Ability to Sell and Deliver Solutions (150 Points)**

Describe your company's capability to meet the needs of Sourcewell participating entities across the US and Canada, as applicable. Your response should address in detail at least the following areas: locations of your network of sales and service providers, the number of workers (full-time equivalents) involved in each sector, whether these workers are your direct employees (or employees of a third party), and any overlap between the sales and service functions.

Line Item	Question	Response *	
26	Sales force.	ATSR firm owners/partners are the sales force for generating annual work. ATSR's in-house marketing manager investigates project opportunities along with firm partners. Of the 51 ATSR staff, 15 staff are mainly responsible for sales of the firm. That is to say, the remaining 36 staff are definitely impactful on quality, schedule, design, and construction administration that indirectly impacts future sales for the firm. Each staff person's performance in design, drawings, specifications, and project performance contributes to client satisfaction and therefore sales.	*
27	Describe the network of Authorized Sellers who will deliver Solutions, including dealers, distributors, resellers, and other distribution methods.	ATSR is a professional services provider in the facilities assessment, planning, architectural, and engineering disciplines with full-time ATSR employees. ATSR services are not offered through a dealer network or other distribution network.	*

28	Service force.	<p>The ATSR team is made up of 51 full-time professional staff headquartered in Minneapolis, Minnesota. We successfully serve our local, regional, national, and international clients through this location. 100% of our staff make up our service force to clients.</p> <p>The ATSR team consists of in-house specialists in nearly all disciplines necessary for facilities conditions assessments, planning, architectural, and engineering services. For major disciplines not in-house (i.e., structural engineering and civil engineering), ATSR has strong long-term consultant relationships (some extending 60+ years) with professional firms to provide those services as part of ATSR's seamless delivery to our clients.</p> <p>This organizational structure is a benefit to our clients for consistency in scope, quality, scheduling, budgeting, and annual year-to-year service on numerous assessment projects, versus a firm that provides limited services in-house and hires different outside consultants per project. This is a major difference from other firms. ATSR's specific knowledge, expertise, and resources benefit the client. ATSR invests heavily in its people, providing training and mentoring for all disciplines, keeping up on the latest codes, energy modeling, new systems/equipment/products, and sustainability directions.</p> <p>ATSR is regarded as an exceptional firm by vendors, suppliers, and manufacturers in the education and government market. For special assessments of facilities conditions of specific product equipment (e.g., gym apparatus, bleacher seating, electronic scoreboards, kitchen hoods, diving boards), ATSR brings on highly qualified product representative consultants skilled in the specific item to evaluate.</p> <p>ATSR's focus is the education and government sectors. We believe through staff longevity and mentoring we provide our best services to our clients with our specialized and highly qualified staff operating out of our central headquarters (versus the approach of forming 'watered-down' branch offices). Our staff has extensive experience; we are not 'cutting-our-teeth' on your project. ATSR is efficient and knows when and what services to perform that provide our clients' the most valuable results – through a fun and collaborative experience working together.</p>	*
29	Describe the ordering process. If orders will be handled by distributors, dealers or others, explain the respective roles of the Proposer and others.	<p>ATSR's ordering process is managed by ATSR owner partners who are all project managers, architects, and engineers of the firm. The ordering process begins with a direct communication between a client and the ATSR owner partner (i.e., through competitive proposals/interviews or directly via repeat service; 80%+ of our work is through repeat business). Our process is to provide a signed original contract agreement satisfactory to both parties for the specific project and other projects as desired by the client. Under the original contract agreement, we frequently prepare a Work Authorization document for added projects that our client requires ATSR to provide service. The Work Authorization document is well-described with scope, compensation, schedule, and budget – all attached to the original contract agreement created.</p> <p>ATSR's ordering process is as follows: 1) Client communication with ATSR firm owner; 2) Contract agreement or Work Authorization document draft is created by ATSR owner and contracts team and edited as needed to both parties' satisfaction; 3) ATSR owner and contracts team finalizes the contract agreement or Work Authorization document for signatures and filing; 4) ATSR's project team and controller are trained on all components of the contract or Work Authorization document for consistency of scope of services, invoicing, and closeout.</p>	*

30	Describe in detail the process and procedure of your customer service program, if applicable. Include your response-time capabilities and commitments, as well as any incentives that help your providers meet your stated service goals or promises.	<p>ATSR's mission and vision focuses on the highest quality of comprehensive service to our clients. Performance and customer service are at the forefront of our daily commitment and why we are in business. We work hard for our clients and want to be the 'first call' from our customers. Our best service to our customer is to 'listen' to our client and 'do it right the first time.'</p> <p>Because customer service and satisfaction are our highest priorities, ATSR has an owner partner assigned and responsible to a client to actively lead the project(s). Contact with our clients on the active projects is typically daily; ATSR's customer service program is immensely proactive and interactive. ATSR's directive to our staff is to respond immediately to our client's inquiries. With email, texting, voicemail, video conferencing, and other technology available at ATSR, our attitude is that there is no excuse for a delayed response. Our staff's cell phone and company email are accessible 24 hours per day; ATSR project team response time is within several hours to reach out to the client. ATSR functions as a team; if one team member is not available, another will respond to the client to touch base and track down what is needed – even our in-house full-time receptionist intervenes to connect the right people.</p> <p>ATSR prides itself in embracing our client's mission, vision, and objectives for each project we perform. We consider our firm as an extension of our client's business, engaging in their success. During a project, we regularly meet to review performance, progress, and client expectations. We periodically send out electronic surveys for client input and perform post-occupancy/post-project evaluations for client input/feedback. We are constantly learning how to improve and better serve our clients.</p> <p>Should ATSR become a Sourcewell service partner, our President, David Maroney AIA/NCARB, will be actively involved in this relationship, to consistently confirm partnership satisfaction and that Sourcewell and client expectations are met. For projects, ATSR's attitude is to be in constant contact with our clients so that any issue is resolved quickly and does not fester or expand.</p> <p>Regarding incentives to help providers, ATSR views this question in two ways: 1) For projects, we collaborate with our clients to achieve energy rebates, grants opportunities, discounts, and other incentives that benefit the project; 2) For ATSR staff responsiveness to customer service, ATSR's Board of Directors observes and rewards staff for excellent customer service through bonuses, promotions, and peer recognition in the firm (with all staff 'under-one-roof' in our main headquarters, it is easy to observe and recognize ATSR top performers).</p>
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31	Describe your process for data collection, review, and analysis.	<p>ATSR leads the client through the specific facility assessment and planning process. Our process of collection-review-analysis is based on excellent communications, accuracy/consistency, inclusion, and developing long-term solutions. ATSR engages our G.E.M.S. (i.e., Gather Information, Evaluate Data, Model Findings, Solve Creatively) process to 'uncover every stone' in evaluating your facilities for 'right-sizing' to be future-ready. ATSR provides a participatory process for the project as follows:</p> <ol style="list-style-type: none"> <li>1) We recommend the client form a facilities conditions assessment (FCA) steering committee (and executive committee as appropriate) as the decision-making body for the project, through bi-weekly/monthly meetings led by ATSR.</li> <li>2) We meet with your team to refine steps in the process to your satisfaction.</li> <li>3) It is vital to understand curriculum/program so that our facility assessment considers how the facility is utilized. We meet with you to understand expected performance of systems/components/equipment.</li> <li>4) ATSR specialists share our expertise in forward-thinking future-ready school facilities/systems trends.</li> <li>5) Our assessment team generates categories, criteria, ratings levels, priorities, sampling, and other metrics with the client prior to commencing actual building assessments and confirms all category types and evaluation metrics with the client prior to moving ahead. Our team is comprised of specialists, suppliers, manufacturers, and/or consultants that specialize in each component/category. With our team, the client has access to experts of each component, to gain insight on product/component/system options that best serve the client long-term.</li> <li>6) Our team conducts an initial pilot assessment on a building and reviews with the client the conditions for final refinement of process, ratings, sampling, cost estimates, and priorities.</li> <li>7) Our team then schedules each building to assess. Based on the project size or number of facilities, we send out several teams to collect the data and input it into the software. We hold weekly/bi-weekly meetings with the client to review progress and details revealed by each discipline for each facility.</li> <li>8) For items evaluated, we discuss quality expectations and life cycle with the client and prepare construction/project cost estimates with inflation for immediate/future replacement planning.</li> <li>9) As evaluations are conducted/documented, ATSR revises and reviews results/proposals with the client prior to refining and inputting into the software. For the project it is essential for consistency; we have trained PreK-12 facilities specialists who view with the "same set of eyes" for each facility. The client is actively involved throughout the entire process.</li> <li>10) Project priority reporting is worked on with client input/requirements, with options and scenarios developed collaboratively for a final report.</li> </ol> <p>ATSR has protocols and typical schedules for assessment and planning projects, which we refine with the client for agreement.</p>
32	Describe any forecasting of potential renovations, upgrades, or modifications	<p>ATSR is a leader in providing facilities design concepts and accurate cost estimates and scheduling for potential renovations, upgrades, modifications, additions, and new facilities. Our estimates are projected to cover future construction cost inflation, typically five to ten years into the future.</p> <p>The facilities assessment plan begins with assessing the client's building(s), which involves understanding more than just their physical condition. The assessment component focuses on current program standards, the client's guidelines, and upcoming new directions in practices; all these parameters can be affected by the constraints of a site/building.</p> <p><b>APPROACH</b></p> <p>Building assessment considers physical conditions, adequacy of facilities and spaces with regard to square footage, furniture, equipment, and utilities, etc., and how the client is currently using the spaces and it practices/programs. Site assessment considers site size, configuration, access for pedestrians, vehicular movement, parking, etc.</p> <p>Building users need to have well thought-out and operational environments to engage individual and collaborative productivity with appropriate tools/systems at their disposal. ATSR engages our G.E.M.S. (i.e., Gather Information, Evaluate Data, Model Findings, Solve Creatively) process to 'uncover every stone' in evaluating your facilities for 'right-sizing' to be future-ready.</p> <p>The following are the components of G.E.M.S. to gather information, evaluate, model, and solve the facilities assessments and planning through input meetings with the client and specific user groups as appropriate, which all play a major function in forecasting upgrades to facilities. In this regard, our focus is in the following areas:</p> <ol style="list-style-type: none"> <li>1) <b>SPACE UTILIZATION / PROGRAM CAPACITIES OF BUILDINGS</b> <ul style="list-style-type: none"> <li>- Develop/confirm/refine the client's planning criteria for space functions, sizes, occupants, and standards.</li> <li>- Develop space utilization plans/charts to determine program capacity of each building and how the building is currently effectually utilized.</li> </ul> </li> </ol>

- Evaluate building/site capacity of space for needed building physical improvements to achieve equitable facilities that are future-ready.
  - Provide recommendations/concepts of appropriately sized spaces based on state guidelines/standards or other and as tailored to the client's requirements.
  - Bring all information forward to the client for dialogue and decisions.
- 2) PROGRAM ADEQUACY OF SPACES
- Analyze master schedules, core areas, and extra-curricular activities impact on each building.
  - Tour each building and confirm existing spaces and adjacencies between spaces.
  - Obtain user input regarding environments for individual, team, small groups, classrooms, and large groups; discuss/learn how these environments may be improved to enhance performance for all users for future-ready purposes.
  - Determine existing space shortfalls and related opportunities to improve the pathways to excellence for all users at each building.
  - Determine options for needed physical improvements at each building.
  - Bring all information forward to the client for dialogue and decisions.
- 3) PHYSICAL CONDITIONS
- Meet with the client to confirm scope of study at each building and confirm standards.
  - Meet with the client building staff to learn of their perceptions of physical condition issues.
  - Tour each building to evaluate physical building condition and receive building staff observations.
  - Provide documentation of physical plant concerns.
  - Prepare a spreadsheet for each building's items that require replacement or renovation, with related cost estimates for upgrade of items.
  - Prepare a proposed timeline for updates and modernizations for review (with forecasting of yearly cost inflation).
  - Coordinate with the client's current/planned future long-term facilities maintenance (LTFM) plans.
  - Bring all information forward to the client for dialogue and decisions.
- 4) MODEL OPTIONS FOR PROGRAM IMPROVEMENTS, WITH RECOMMENDATIONS VIA CONSENSUS
- Present future-ready' facilities workshop to engage the client into how programs change over time and how to prepare facilities for the future.
  - Present information gathered and prepared from the initial three steps.
  - Lead the client in establishing objectives and modeling facilities concept options for the client's program for current use and the future.
  - Engage the client into input/feedback on gathered information and long-range facilities options to explore.
  - Create/critique facilities design concept options of needed renovations, upgrades, or additions from the steps performed above. Provide design concepts and cost estimates with construction inflation for future coverage.
  - Modify and/or add options for final recommendations - through consensus.
  - Generate facilities recommendations of potential maintenance, renovations, upgrades, or modifications with the client and present to the governing body.



33	Describe any cost analysis and budgeting tools you utilize and how the information is shared with stakeholders.	<p>ATSR has an excellent record of establishing realistic project budgets, receiving bids within budget estimates, and completing projects with minimal change orders within the budget. Our cost estimating is based on 80 years of accuracy. With an extensive cost database, we dissect costs for facilities assessments, new construction, additions, alterations/remodeling projects, architectural/mechanical/electrical systems, long-term facilities maintenance work, roofing/paving/window/door replacements, and other projects.</p> <p>From our project experience, we find that six major factors influence construction costs:</p> <ul style="list-style-type: none"> <li>- Building area and volume</li> <li>- Design and detailing</li> <li>- Selection of materials and systems</li> <li>- Quality of construction documents</li> <li>- Bidding competitiveness</li> <li>- Construction economy at bid date</li> </ul> <p>The owner and architect control items 1-4. Bidding competitiveness (item 5) is dependent on contractor interest/timing and architect communications with potential bidders. Construction economy (item 6) is an unknown for a future bid date; ATSR excels in accurately forecasting costs (by as much as 10 years ahead of the bid date), utilizing past projects and spreadsheets.</p> <p><b>CONTROLLING COSTS</b></p> <p>ATSR's tools to control costs are through building area/volume, design, systems/materials choices, and site development. Value-conscious architecture starts with design options/features and systems/materials selections. With \$2+ billion of facilities recently designed, we accurately estimate and continually analyze designs, updating costs to monitor and control budgets. For assessments, planning, and other projects, we implement these estimating methods:</p> <ul style="list-style-type: none"> <li>- Cost per square foot analysis (for building overall and for types of spaces)</li> <li>- Quantity take-off estimates for specific items</li> <li>- Best-value engineering</li> <li>- Life-cycle costing (initial vs. long-term costs)</li> <li>- Rebates for offsetting specific systems costs</li> </ul> <p>During project refinement, project cost 'alternates' are discussed as a measure to control unforeseen bidding climate conditions that may affect budgets and other cost factors. For estimating future construction inflation, we utilize the Engineering News Record (ENR) Historical Building Construction Cost Index and other construction indices.</p> <p><b>PROJECT COST INCLUSIVENESS</b></p> <p>In addition to the construction cost, there are other components that make up the project cost. For budget preparation, we partner with the client to identify all costs of the project. Typically, we setup multipliers to construction costs to include supporting costs as identified in the next sentence. ATSR brings to the client proven experience in preparing, monitoring, and controlling budgets for all areas including:</p> <ul style="list-style-type: none"> <li>- Construction cost and construction inflation</li> <li>- Professional services fees</li> <li>- Furniture, fixtures, and equipment budgeting</li> <li>- Technology (voice/data/video/security) costs</li> <li>- Permits and municipal/state utilities charges</li> <li>- Surveys, soil borings, environmental services</li> <li>- Off-site development costs</li> <li>- Project contingency</li> <li>- Alternative funding sources</li> <li>- Energy rebates/paybacks</li> </ul> <p><b>MILESTONE CHECK-UPS</b></p> <p>At each milestone of a project/service, we confirm budgets/estimates with the client. During the assessment/planning/design/production effort, if cost estimates exceed allotted budgets, we work with the client by doing the following:</p> <ul style="list-style-type: none"> <li>- Notify the client immediately of a discrepancy</li> <li>- Reanalyze estimates (e.g., area/unit costs, systems, inflation multipliers, and contingencies)</li> <li>- Identify components affecting overages</li> <li>- Present transparent analysis as to causes and solutions for estimates to align with budgets</li> <li>- Prioritize options toward lowering estimates</li> <li>- Document decisions and determine what could become bid alternates</li> </ul> <p>Our clients appreciate ATSR's approach to teamwork and establishing long-term, trusting relationships, some extending over 70 years. ATSR shows clients the cost spreadsheets generated for their project(s); we refine costs with the owner upon review of scope, quality, scheduling, and lifecycle. Our process is truly collaborative, with the client involved in every step as they desire.</p>
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34	Describe your ability and willingness to provide your products and services to Sourcewell participating entities.	<p>For 80 years ATSR has provided professional services to public school districts and other governmental agencies. 98% of ATSR's work annually is with school districts and governmental agencies for planning, assessment, architectural, and engineering services. We have the strong ability and willingness to provide excellent services to Sourcewell participating entities.</p> <p>ATSR is nationally and internationally recognized in the PreK-12 public school market. From our headquarters in Minneapolis, Minnesota, we have planned, assessed, and designed numerous projects for various-sized school districts in Minnesota, Wisconsin, North Dakota, South Dakota, Illinois, Indiana, Colorado, Pennsylvania, Alaska, and Arkansas, including facilities conditions assessments, facilities planning, new schools, and additions/remodeling/maintenance projects. ATSR worked for the Department of Interior Bureau of Indian Affairs (DOI-BIA) in assessing conditions of hundreds of school facilities on reservations throughout 40+ States in the U.S.</p> <p>Internationally, ATSR started serving the United States Agency for International Development (USAID) in 2006 to current for designing 90+ new public schools for the Hashemite Kingdom of Jordan; ATSR has designed other education projects in Saudi Arabia and Kuwait.</p> <p>ATSR believes that we best serve the client from our central Minneapolis headquarters to virtually anywhere in the U.S. and extending overseas with local partners. Air travel is a way of life for our highly qualified professional staff. Our experience/knowledge is your resource; we are enthusiastic to serve clients throughout the U.S. and Canada.</p> <p>ATSR is highly regarded in the U.S. PreK-12 education market segment; ATSR firm owners author articles regularly for national education magazines including American School &amp; University Magazine. Our firm owners are frequent presenters at national education conferences and have presented at EDSpaces, Association For learning Environments (A4LE), AASA, NSBA, and others.</p>	*
35	Describe your ability and willingness to provide your products and services to Sourcewell participating entities in Canada.	<p>Although ATSR has not provided professional services in Canada, we are very interested. For 80 years ATSR has provided professional services to public school districts and other governmental agencies in the U.S. 98% of ATSR's work annually is with school districts and governmental agencies for planning, assessment, architectural, and engineering services. We have the ability (upon licensing application and receipt) and the willingness to provide services to Sourcewell participating entities in Canada.</p> <p>ATSR is nationally and internationally recognized in the PreK-12 public school market. From our headquarters in Minneapolis, Minnesota, we have planned, assessed, and designed numerous projects for various-sized school districts in Minnesota, Wisconsin, North Dakota, South Dakota, Illinois, Indiana, Colorado, Pennsylvania, Alaska, and Arkansas, including facilities conditions assessments, facilities planning, new schools, and additions/remodeling/maintenance projects. ATSR worked for the Department of Interior Bureau of Indian Affairs (DOI-BIA) in assessing conditions of hundreds of school facilities on reservations throughout 40+ States in the U.S.</p> <p>Internationally, ATSR started serving the United States Agency for International Development (USAID) in 2006 to current for designing 90+ new public schools for the Hashemite Kingdom of Jordan; ATSR has designed other education projects in Saudi Arabia and Kuwait.</p> <p>ATSR believes that we best serve the client from our central Minneapolis headquarters to virtually anywhere in the U.S., Canada, and extending overseas with local partners. Air travel is a way of life for our highly qualified professional staff. Our experience/knowledge is your resource.</p> <p>ATSR is highly regarded in the U.S. PreK-12 education market segment; ATSR firm owners author articles regularly for national education magazines including American School &amp; University Magazine. Our firm owners are frequent presenters at national education conferences and have presented at EDSpaces, Association For learning Environments (A4LE), AASA, NSBA, and others.</p>	*
36	Identify any geographic areas of the United States or Canada that you will NOT be fully serving through the proposed agreement.	ATSR does not anticipate limiting services in geographic areas of the U.S. and Canada, unless otherwise determined not feasible for our personnel or on account of uncontrollable scheduling conflicts.	*
37	Identify any account type of Participating Entity which will not have full access to your Solutions if awarded an agreement, and the reasoning for this.	ATSR does not foresee any conflict with this. ATSR is able and ready to provide services to government, education, and not-for-profit entities.	*
38	Define any specific requirements or restrictions that would apply to our participating entities in Hawaii and Alaska and in US Territories.	ATSR has no specific contract requirements or restrictions that would apply to Sourcewell's participating entities in Hawaii, Alaska, or the U.S. Territories.	*

39	Will Proposer extend terms of any awarded master agreement to nonprofit entities?	Assuming we understand this question, we interpret this in two ways - that ATSR provides service to a nonprofit entity -or- ATSR partners with a nonprofit entity selected by Sourcewell. We offer the following response: 1) ATSR is willing to extend terms of any awarded master agreement for ATSR to provide ATSR services nonprofit entities, if required by Sourcewell. 2) ATSR would consider partnering with a nonprofit entity if required by Sourcewell for services rendered. ATSR reserves the right to evaluate the selected services and the nonprofit entity partner proposed by Sourcewell.	*
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**Table 4: Marketing Plan (100 Points)**

Line Item	Question	Response *	
40	Describe your marketing strategy for promoting this opportunity. Upload representative samples of your marketing materials (if applicable) in the document upload section of your response.	<p>ATSR is a nationally recognized firm specializing in planning, assessments, architectural, and engineering services for the education and municipal/civic project sectors since 1944. We have strong client long-term client relationships, some extending over 70 years. Our marketing and communications team is strong regarding messaging to our PreK-12 clients the partnerships we are engaged with. We are actively updating new material on our website (www.atsr.com), Facebook page, LinkedIn, X, Instagram, and other social media, communicating events and new business partnerships and projects in which ATSR is involved. This would include our new partnership with Sourcewell, encouraging our clients and contacts to utilize these services and become members of Sourcewell.</p> <p>ATSR is active in many professional associations where we can bring exposure to Sourcewell and our partnership teaming activity, including organizations such as:</p> <ul style="list-style-type: none"> <li>- National School Boards Association (NSBA)</li> <li>- American Association of School Administrators (AASA)</li> <li>- Association for Learning Environments (A4LE)</li> <li>- United States Agency for International Development (USAID)</li> <li>- American Council of Engineering Consultants (ACEC)</li> <li>- Minnesota Association of School Administrators (MASA)</li> <li>- Wisconsin Association of School District Administrators (WASDA)</li> <li>- Illinois Association of School Boards (IASB)</li> <li>- Wisconsin Association of School Business Officials (WASBO)</li> </ul> <p>ATSR also exhibits at numerous conventions and conferences annually in the U.S. This exposure to thousands of potential clients is a benefit for communicating Sourcewell's connection with ATSR. For example, we exhibit and are frequent featured presenters at MASA, IASB, WASDA, A4LE, EDspaces, Midwest Facility Masters Conference, and others. These events provide us with the opportunity to have face-to-face time with potential and current clients where we are able to promote the Sourcewell contact directly in person and also in our exhibit booth space.</p> <p>Also, ATSR is a regular writer for American School &amp; University (AS&amp;U) Magazine, authoring a bi-monthly column in the area of facility planning, since 2006, with a strong following of readers. While the articles are set in a 'guide' or 'how to' theme, not promoting ATSR or any trademark approach, the ATSR name recognition as 'author' is an important benefit in marketing and would serve as a benefit for a connection with Sourcewell. AS&amp;U's distribution reaches every school district in the U.S. as well as higher education and other governmental agencies. ATSR also publishes articles in Learning By Design Magazine and others.</p> <p>ATSR is excited to pursue additional advertising and marketing resources that will benefit Sourcewell and ATSR's relationship for future potential clients and market sectors.</p>	*
41	Describe your use of technology and digital data (e.g., social media, metadata usage) to enhance marketing effectiveness.	<p>Digital marketing plays an effective role in ATSR's marketing strategy for current and future business, as well as supporting our clients' vision and mission objectives. We use various social media platforms including: Facebook, Instagram, X, LinkedIn, and Youtube. We track our analytics to ensure that our posts and content are being seen and are purposeful. We also know that our user groups are utilizing these specific platforms and that is why we have chosen them.</p> <p>ATSR also utilizes MailChimp to send out ATSR quarterly newsletters and promotional information to clients and subscribers. These tools will be an excellent way to share and market a Sourcewell contract and to encourage clients to become Sourcewell consumers.</p> <p>ATSR also utilizes on-line surveys with our clients to learn more detail about ATSR's performance, our clients' additional needs for additional services, and potential opportunities to better serve our clients. We see this tool as a valuable resource to promote and further our relationship with Sourcewell to our current clients.</p> <p>ATSR's website has recently been reconfigured and updated to show ATSR's services, updated news, new projects, events, client testimonials, and hiring activities. We see this as an opportunity to link to Sourcewell's resources as an added connection feature for our clients and display Sourcewell's logo on our website if permitted.</p>	*

42	In your view, what is Sourcewell's role in promoting agreements arising out of this RFP? How will you integrate a Sourcewell-awarded agreement into your sales process?	<p>If ATSR is selected as a Sourcewell member, we look forward to sharing our logo and marketing information with you to announce our new relationship to the current Sourcewell client base. Likewise, ATSR will promote our new relationship on our marketing materials and digital platforms. We look forward to both of our marketing teams collaborating to expose our two firms in the best possible light, promoting each firm's attributes and benefits for current and potential customers.</p> <p>ATSR frequently interviews for new projects, and we intend to carve out a segment of our interview presentation and proposal document to market the benefits of being a Sourcewell partner and the services available to our client. This approach benefits Sourcewell and ATSR and especially provides a major benefit for customers.</p> <p>ATSR will promote our relationship and awarded contracts with Sourcewell through our digital platforms as well, including our website, Facebook, X, Instagram, YouTube, ATSR digital newsletter, and others.</p>	*
43	Are your Solutions available through an e-procurement ordering process? If so, describe your e-procurement system and how governmental and educational customers have used it.	<p>ATSR does not offer services through an e-procurement ordering process. Our business model emphasizes that each client is unique and that ATSR services are tailored specifically to our client's needs. Therefore, we engage in a direct personal interaction strategy to best serve clients.</p> <p>For each proposal, we meet with the customer to fully understand their needs, scope, and expectations before we prepare a proposal for services. Each proposal response for customer projects is created individually, based on the customer's unique requirements, needs, and expectations. We know our market sector customers do not desire a 'one-size-fits-all' package; it is not part of ATSR's business model.</p>	*

**Table 5A: Value-Added Attributes (100 Points)**

Line Item	Question	Response *	
44	Describe any product, equipment, maintenance, or operator training programs that you offer to Sourcewell participating entities. Include details, such as whether training is standard or optional, who provides training, and any costs that apply.	<p>ATSR is a professional services firm; we are not a manufacturer or software provider with hard products, equipment, or physical systems for which training would be involved. However, when ATSR is involved with a client in facility assessment and planning, we meet with user groups to introduce our approach, services, and data collection process for assessment and planning projects. Through this effort, our professional staff is essentially training clients how to perform a facilities assessment. At the end of an assessment project, ATSR provides our client with ATSR's in-house assessment software spreadsheet that the client can use to manage current and future facilities projects. Also, our staff trains clients individually or as a group how to utilize ATSR's in-house facility assessment software for a project and to update spreadsheets annually. ATSR collaborates with clients annually to update facilities assessments software to keep project needs current and with updated cost estimates. These services are included in our professional fees package(s).</p>	*

45	Describe any technological advances that your proposed Solutions offer.	<p>ATSR has created our own facilities assessment Excel software spreadsheet document, built over many years of performing work for our clients. ATSR's tool is utilized to track all parts of facilities conditions to give the client a detailed and comprehensive view of:</p> <ul style="list-style-type: none"> <li>- The facility's conditions</li> <li>- Years of life expectancy remaining of systems</li> <li>- Scheduled replacement of systems as they age</li> <li>- Unit costs (e.g., lump sum, cost per square foot, cost per item)</li> <li>- Current and future estimated construction and project costs</li> <li>- Options for prioritization</li> <li>- Sources for different funding mechanisms</li> </ul> <p>This spreadsheet document system allows the client to budget items immediately and in the future and includes construction inflation for accurate costing for timely product/system replacement. In our software tool system, we tailor description items to fit the client's unique requirements for assessing conditions of windows, doors, hardware, walls, floors, ceilings, building envelope, roofs, mechanical systems, security, technology, lighting, electrical systems, food service equipment, bleachers, piping, pavement, playground equipment, and much more.</p> <p>Additionally, we draw all building plans in REVIT, which provides the client with a 3-dimensional digital image of the building for equipment locations and areas of work involved. For assessment work, ATSR utilizes advances in energy modeling software that allows for modeling various mechanical systems, wall systems, windows, doors, roofs, and/or lighting systems to inform clients of outcomes and allows them to make decisions related to the building design and fit-out requirements.</p> <p>When ATSR commences with a facilities assessment and planning project, we utilize our client's standards guidelines or collaborate with them to create standards on which products/systems evaluations are based. Frequently, ATSR will lead the client through a standardized document based on the CSI specifications categories, with emphasis on products, performance, details, and installation requirements.</p> <p>In creating a Facilities Conditions Index (i.e., a comparisons matrix illustrating priority categories in relation with all buildings), which is based on the assessment spreadsheet, the client can visually see quickly how facilities compare with one another, which facilities have the highest overall need, and which facilities are the best performers operationally. A sample is provided in this submittal.</p>
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46	Describe any "green" initiatives that relate to your company or to your Solutions, and include a list of the certifying agency for each.	<p>ATSR designs buildings to be energy efficient and to exceed code requirements with high performance standards. We have numerous LEED accredited professionals on staff in interior design, architecture, mechanical engineering, and electrical engineering to guide a client through the process. We adhere to recommendations of the US Green Building Council, Energy Star, WELL, and the State of Minnesota B3 Guidelines program.</p> <p>The B3 Guidelines and ASHRAE energy standards become an integral component of ATSR designs, incorporating 'benchmarking', 'energy efficient operations', and 'post occupancy evaluation' to observe and improve facilities operations. For our clients, ATSR designs with key B3 principles consisting of:</p> <ul style="list-style-type: none"> <li>- Performance management (e.g., coordination of design, construction, and operations for guidelines)</li> <li>- Site &amp; water (e.g., managing stormwater/soils, light pollution, water efficiency, erosion control, transportation impact)</li> <li>- Energy &amp; atmosphere (e.g., energy efficiency, renewable energy, equipment efficiency, and atmospheric protection)</li> <li>- Indoor environmental quality (e.g., low-emission materials, moisture control, ventilation, thermal comfort, quality lighting, acoustics, vibration reduction, daylight, fenestration view/access)</li> <li>- Materials &amp; waste (e.g., life-cycle assessment, environmentally preferable materials, waste reduction, and health)</li> </ul> <p><b>ENERGY MODELING</b>  ATSR provides energy modeling for client projects to make design decisions that impact energy-efficiency of systems for the project. Energy modeling is used for decision-making on walls/roofs/windows relative to insulation values and shading factors to reduce the building envelope's energy-use impact. Computer programs, like '3D Plus' developed by Trane Company, are utilized to model and compare various types of mechanical systems. The program incorporates information including regional weather data, building components, equipment energy efficiencies, equipment first-cost, regional energy costs, equipment life, and inflation factors to make an analysis of energy-use.</p> <p>Also, the 'Energy Assets' program incorporates strategies for building components, analyzing how each reacts with the other for energy usage. The strategies include analyzing the building wall structure, type and amount of glass, type and control of lighting, various components of the mechanical systems, incorporation of daylighting, occupancy sensors, energy management systems, etc. This program provides annual energy usage and utility costs for the facility. The use of these programs typically shows that energy strategies incorporated into our designs result in a substantial reduction in energy costs. This result is beyond the current State Energy Code requirements.</p> <p><b>DAYLIGHTING – BIOPHILIC DESIGN</b>  Designing for daylighting begins early in design. ATSR provides computer modeling, illustrating daylighting impact and artificial lighting in spaces. We understand the importance of providing natural light in spaces and eliminating direct sun glare. Research shows that connections to the outdoors impacts users learning, concentration, and attitude. Daylighting and artificial lighting complement one another and are monitored through occupancy sensors, photo sensors, light-shelves and other methods that capture the advantages of daylighting. In the projects designed by ATSR, natural light is key to the success of the learning environment.</p> <p>In summary, ATSR brings these 'green' initiatives to clients as part of our professional service.</p>
47	Identify any third-party issued eco-labels, ratings or certifications that your company has received for the Solutions included in your Proposal related to energy efficiency or conservation, life-cycle design (cradle-to-cradle), or other green/sustainability factors.	<p>As a professional services firm, ATSR designs buildings to various green or sustainable initiatives such as LEED, Energy Star, B3, and others and assists the client in obtaining certifications and/or designing to certifications. We have LEED accredited professionals on staff and have worked with all certifications noted above.</p> <p>A partial listing of certifications for our projects include:</p> <ul style="list-style-type: none"> <li>- Stillson New Elementary School, Chippewa Falls, WI (Focus on Energy)</li> <li>- Red Baron Expo Center (SMASC) Southwest Minnesota Amateur Sports Commission (State of Minnesota for B3 compliance)</li> <li>- New Richmond High School, New Richmond, WI (LEED for Schools registered and Energy Star)</li> <li>- Cortland Elementary School, DeKalb, IL (LEED for Schools registered)</li> <li>- Bay Harbor Elementary School, Green Bay, WI (LEED for Schools registered)</li> <li>- Southwest High School Addition/Alterations, Minneapolis, MN (ACEC 'Honor Award' for Energy Efficiency)</li> <li>- Skyview K-8 Community School, Oakdale, MN (ACEC 'Grand Award for Engineering Excellence')</li> <li>- Red Wing High School, Red Wing, MN, (ACEC 'Engineering Excellence Award')</li> <li>- Hillside Elementary School, New Richmond, WI (Energy Star)</li> </ul>



48	Describe approaches used by your company to align recommendations with an owner's sustainability goals.	<p>ATSR corporately implements a holistic approach to sustainable design for clients. We begin with the long-range in mind to incorporate high-performance design/construction/operation. ATSR guides clients to establish building performance goals and define implementation strategies for the design. The success of sustainable design is measured, in part, by how well the building/site design is a teaching tool, creating a higher performing student.</p> <p>A successful sustainable building solution consists of the following:</p> <ul style="list-style-type: none"> <li>- Community inclusion in site selection, shared usage, transportation integration, and infrastructure</li> <li>- Sensible construction costs, focusing on design simplicity, optimal building massing, structural simplicity, and construction efficiency</li> <li>- Building maintenance operations, through effective materials selection, quality design, low maintenance, and easily replaceable products</li> <li>- Sustainable environments with low energy-use, materials fabrication conservation, natural landscaping, and construction methods</li> <li>- Healthy indoor environments with learning comfort, healthy air-exchanges, natural-controlled ventilation, and zero emissions</li> <li>- Low operating costs through energy efficiency and energy management, building form/envelope, daylighting, solar design, and water conservation</li> </ul> <p>Using the category themes noted above as a roadmap, ATSR guides clients through the design process for their project. ATSR's approach is to listen to the client's sustainability goals, respectfully acknowledge their objectives, offer ideas and examples where additional sustainability measures can be achieved, and collectively analyze (through life-cycle costing, payback calculations, rebate offers) and recommend the best value for the client in their decision making.</p> <p>ATSR utilizes the AIA agreement documents for achieving Sustainability Objectives and adheres to protocols established for meeting the client's objectives.</p>
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49	<p>What unique attributes does your company, your products, or your services offer to Sourcewell participating entities? What makes your proposed solutions unique in your industry as it applies to Sourcewell participating entities?</p>	<p>The best way to express ATSR's unique attributes and solutions that directly benefit our clients, and will benefit Sourcewell and Sourcewell clients, is to share what ATSR clients directly say about our performance and services that make ATSR unique. Here are the top attributes our clients share about ATSR's strengths:</p> <p>Superior Overall Performance          "Exceptional at balancing budget, business, and design"          "Partners with you forever..."          "98% of annual work is schools = extensive experience"</p> <p>The Knowledge Experts for PreK-12 Schools          "National and international leaders in schools"          "Focus on meeting the client's educational needs"          "Moves quickly with new ideas/concepts for school design"</p> <p>One-Stop-Shop—Multi-Disciplinary Team          "In-house experts in all core areas"          "Staff with in-depth understanding of schools"          "Brings the latest in research and systems to the project"</p> <p>Builds Consensus Between Diverse Groups          "Successful in building interpersonal relationships"          "Ability to listen and present creative solutions"          "Engages people and establishes partnerships"</p> <p>Forward-Thinking and Future-Ready Innovative Design          "Personal care results in excellent designs"          "Creates 'future-ready' learning experience for students"          "Meeting clients' needs rather than building monuments"</p> <p>Creates Cost Saving Efficiencies          "Creative designs that maximize space and save money"          "High performance sustainable energy-efficient facilities"          "Low operations &amp; maintenance costs with effective design"</p> <p>Accurate Cost Estimates &amp; On-Time          "Extremely accurate estimates = value with ATSR on-board"          "On-time, within budget, and at the highest quality"          "Low change orders due to high quality service and care"</p> <p>Thorough Process for Solutions          "...well-above industry standards with a competitive price!"          "ATSR uncovers every stone, not taking the shortest path!"</p> <p>ATSR Owner/Partner Leadership          "...from start-to-finish = Consistency and Transparency!"          "Respectfully shares vast experience - absolutely no weak link!"</p> <p>G.E.M.S. Process is Excellent          "Great process - Gather / Evaluate / Model / Solve-Share!"          "A complete, transparent, and engaging process in every way!"</p> <p>Facilities Assessment and Master Planning Specialists          "Hundreds of facilities studies for school districts!"          "Long-range planning / educational adequacy / equity analyses / enrollment capacities / community consensus..."</p> <p>Also see attached ATSR design and project experience in the Attached Documents section.</p>
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**Table 5B: Value-Added Attributes**

Line Item	Question	Certification	Offered	Comment
50	Select any Women or Minority Business Entity (WMBE), Small Business Entity (SBE), or veteran owned business certifications that your company or hub partners have obtained. Upload documentation and a listing of dealerships, HUB partners or re-sellers if available. Select all that apply.		<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
51		Minority Business Enterprise (MBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
52		Women Business Enterprise (WBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
53		Disabled-Owned Business Enterprise (DOBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
54		Veteran-Owned Business Enterprise (VBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
55		Service-Disabled Veteran-Owned Business (SDVOB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
56		Small Business Enterprise (SBE)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
57		Small Disadvantaged Business (SDB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.
58		Women-Owned Small Business (WOSB)	<input type="radio"/> Yes <input checked="" type="radio"/> No	N/A; ATSR does not comply with these requirements to hold this identification.

**Table 6: Pricing (400 Points)**

Provide detailed pricing information in the questions that follow below.

Line Item	Question	Response *	
59	Describe your payment terms and accepted payment methods.	ATSR standard payment schedule is net 30 days from invoicing; we invoice as services progress with incremental billing monthly throughout the life of a project. We are open to various payment methods including check and ACH methods.	*
60	Describe any leasing or financing options available for use by educational or governmental entities.	We do not offer financing or leasing options for the professional services we offer.	*
61	Describe any standard transaction documents that you propose to use in connection with an awarded agreement (order forms, terms and conditions, service level agreements, etc.). Upload all template agreements or transaction documents which may be proposed to Participating Entities.	ATSR and our clients are most familiar with and typically utilize the AIA contract agreement documents for projects. Our standard agreement is typically the AIA-B101-2017 Owner-Architect Agreement, which is modified as required to fit the scope of services provided to clients. We attach to the agreement the AIA E203-2013 (Building Information Modeling and Digital Data Exhibit) and AIA-G201-2013 (Project Digital Data Protocol Form) documents. Please see attached. Alternatively, ATSR is open to working with different agreement documents, depending on the project and verbiage contained within. For specific scope projects that include studies and analysis only, ATSR is open to creating a letter of agreement that stipulates scope, compensation, conditions, and other terms as acceptable to the client.	*

62	Do you accept the P-card procurement and payment process? If so, is there any additional cost to Sourcewell participating entities for using this process?	We accept various credit cards for payment processing. We may accept P-card if it is a major credit card company. Typically, fees are greater than the limits of the P-card access.	*
63	Describe your pricing model (e.g., line-item discounts or product-category discounts). Provide detailed pricing data (including standard or list pricing and the Sourcewell discounted price) on all of the items that you want Sourcewell to consider as part of your RFP response. If applicable, provide a SKU for each item in your proposal. Upload your pricing materials (if applicable) in the document upload section of your response.	<p>ATSR provides multiple types and scopes of professional services to our clients. Our approach is to provide a simplified fee structure as acceptable to our customers. For Sourcewell projects, we offer deep discounts off our standard fees as a Sourcewell member. ATSR recognizes that there are in-house cost savings for ATSR as a Sourcewell member providing professional services to clients (Services are further described in Question #64/#65 in Table 6 and Table #7 of this RFP). With this in mind, we offer a discount on fees for Sourcewell member clients (all pricing is listed in U.S. currency). The following fee structures, which can be negotiated, are described for the various services we provide:</p> <p><b>FACILITY PHYSICAL CONDITIONS ASSESSMENTS</b>  ATSR typically bases our fees for this work on the building area assessed. A client may request only a physical conditions assessment for site, architectural, mechanical, electrical, technology components. Our fees (see Question #64 and Table #7) are discounted for Sourcewell members and structured based on square feet (SF) areas as follows:  [0–500,000 SF of building area (includes site): 20% discount off 15 cents/SF= 12 cents/SF*]  [500,001–1,000,000SF of building area (Includes site): 20% discount off 10 cents/SF= 8 cents/SF*]  [1,000,001+ SF of building area (Includes site): 20% discount off 7 cents/SF= 5.6 cents/SF*]  *Plus reimbursable expenses (e.g., mileage, travel, printing).</p> <p><b>LONG-RANGE FACILITIES MASTER PLANNING</b>  ATSR is frequently hired to provide long-range facilities master planning services for customers, a professional service that typically involves task force committees, user group engagement, evaluations of program adequacy and space utilization, as well as conceptual design options with cost estimates for immediate and future planning purposes. Fees for this type of service are negotiated based on scope and services requested. ATSR provides a 20% discount off standard fee for Sourcewell members, plus reimbursable expenses.</p> <p><b>BOND REFERENDUM PLANNING</b>  This professional service involves working with the customer's governing board (e.g., school board) to:  - Refine recommendations from the long-range facilities task force or agency department  - Finalize the recommended facilities plan and cost estimates for a referendum  - Work with the client's financial advisors on taxpayer cost implications  - Prepare government-required (e.g., Minnesota Department of Education Review &amp; Comment submittal) documents for approval to proceed with a public referendum  - Develop strategies and vehicles for marketing communications to voters</p> <p>ATSR fees range based on the scope of services requested and are negotiated as such with the client. ATSR provides a 20% discount off standard fees for Sourcewell members, plus reimbursable expenses.</p> <p><b>FOOD SERVICE FACILITIES PLANNING</b>  ATSR specializes in food service facilities planning. We have worked with numerous school districts in Minnesota, Wisconsin, Illinois, Indiana, Pennsylvania, and other states in the U.S. and frequently provide this special service separately from our other services, or as a consultant to school districts that use a different architectural/engineering firm. Fees are negotiated based on scope and services requested. If services are part of a design for construction, these fees would be included in the overall building project fee. ATSR provides a 10% discount off standard fees for Sourcewell members, plus reimbursable expenses.</p> <p><b>DESIGN AND CONSTRUCTION ADMINISTRATION SERVICES</b>  As described earlier in the response, ATSR is a full-service planning/architectural/engineering firm providing comprehensive professional services in architecture, interior design, mechanical</p>	

engineering, electrical engineering, site development, technology, food service design, interior design, FF&E, cost estimating, and construction administration services for clients. For these services, compensation is typically based on a percentage of construction cost, plus reimbursable expenses (e.g., mileage, travel, printing). Alternatively, we are open to a fixed fee arrangement or other approach as agreeable between the customer and ATSR. ATSR provides a 10% discount off standard fees for Sourcewell members, plus reimbursable expenses (which are typically \$1,500 to \$1,800 per \$1 million of construction cost).

FF&E (FIXTURES, FURNITURE, AND EQUIPMENT) DESIGN, PROCUREMENT, AND COORDINATION

ATSR offers options for this service as follows:

Option One - Comprehensive Services:

In this option, we lead the furniture procurement process. We work with the client to finalize the furniture design from the design services above and determine specific furniture pieces. We prepare documents and specifications for quoting or bidding. We issue the documents to desired furniture vendors and obtain quotes or bids. We compile the numbers, assemble them according to the budget and work with you on which items you accept to ensure the budget is maintained. We assist with any shop drawings, help coordinate installation schedules with contractors and vendors, and perform punch lists after installation. ATSR provides a 10% discount off standard fees for Sourcewell members, which is typically the same as the overall project fee structure (i.e., based on a percentage of furniture construction cost), plus reimbursable expenses.

Option Two - Design/Support Services:

In this option, we work alongside the client's furniture vendor to procure furniture. We share any preliminary furniture layouts and what we learned during the architectural user group meetings and continue to be involved with furniture meetings with your vendor and staff. This option would include assistance with color selections, layout review, and coordinating with the vendor as required to ensure a successful project. It should be noted that the selected furniture vendor would also likely charge a fee for the design services they would provide in this option. ATSR provides a 10% discount off standard fees for Sourcewell members, which is typically 30% of the overall project fee structure (i.e., based on a percentage of furniture construction cost), due to reduced scope from Option One, plus reimbursable expenses.

COMMISSIONING SERVICES

ATSR provides commissioning services on mechanical and electrical systems, whether ATSR-designed or designed by a different firm(s). ATSR integrates the commissioning services during the design, construction, and post-construction phases, working closely with the ATSR design team (or other firm if ATSR is not the designer) to meet the standards and codes requirements for the systems. Our compensation varies depending on the scope of services provided, based on the client's input and preference. Fees are negotiated and are typically based on a price per square foot of the facility or spaces being commissioned. ATSR provides a 10% discount off standard fees (i.e., based on a price per square foot of spaces commissioned), plus reimbursable expenses.

SUMMARY

In summary, ATSR offers a 10% to 20% discount on fees and compensation for professional services as described above to Sourcewell members. For services rendered to Sourcewell members on an hourly basis, ATSR offers a 10% discount on hourly rates, subject to annual adjustment. For example:

Grade 1 Principal: Standard(S)=\$220; Discount(D)=\$198.00  
Grade 2: Principal: (S)=\$240; (D)=\$216.00

Grade 1 Project Manager / Architect / Engineer: (S)=\$185; (D)=\$166.50  
Grade 2 Project Manager / Architect / Engineer: (S)=\$220; (D)=\$198.00

Grade 1 Technician / Designer: (S)=\$140; (D)=\$126.00  
Grade 2 Technician / Designer: (S)=\$175; (D)=\$157.50  
Grade 3 Technician / Designer: (S)=\$195; (D)=\$175.50

Clerical: (S)= <\$150; (D)= <\$135.00

		<p><b>COMBINED SERVICES OFFER</b> When Sourcewell members combine services offered by ATSR, concurrently, an additional 5% discount applies, based on services and scope. We are confident that Sourcewell members will achieve high quality services at discounted ATSR fees for professional services provided. The larger the project and scope or the larger facilities square footage for an assessment project or study, the larger the discount.</p> <p><b>CREDITS</b> Additionally, if ATSR is hired to provide a facilities conditions assessment, a long-range facilities master plan, bond referendum planning, and the final design and construction administration for resulting projects, then the bond referendum planning and master planning services fees are credited to the overall final project fee, based on the amount applicable to the final project.</p> <p><b>REIMBURSABLE EXPENSES</b> Regarding reimbursable expenses, ATSR foregoes the 10% (i.e., 1.10) administrative multiplier typically added to the expense for mileage, printing, cell, travel. Therefore, there is zero (-0-) multiplier on reimbursable expenses.</p> <p><b>SUMMARY</b> Based on the fee structure presented above, we believe ATSR is offering strong incentives to become a Sourcewell member that will directly benefit Sourcewell clients.</p>	
64	Quantify the pricing discount represented by the pricing proposal in this response. For example, if the pricing in your response represents a percentage discount from MSRP or list, state the percentage or percentage range.	<p>ATSR offers a 10% to 20% discount for fees and compensation for professional services as described in Question #63 and Table #7 provided to Sourcewell members. For services rendered to Sourcewell members on an hourly basis, ATSR offers a 10% discount on hourly rates. When Sourcewell members combine services offered by ATSR, at the same time, an additional 5% discount applies. We are confident that Sourcewell members will achieve high quality services at discounted ATSR fees for all services provided.</p> <p>Additionally, if ATSR is hired to provide a facilities conditions assessment, a long-range facilities master plan, bond referendum planning, and the final design and construction administration for resulting projects, then the bond referendum planning and master planning services fees are credited to the overall final project fee, based on the amount applicable to the final project.</p> <p><b>REIMBURSABLE EXPENSES</b> Regarding reimbursable expenses, ATSR foregoes the 10% (i.e., 1.10) administrative multiplier typically added to the expense for mileage, printing, cell, travel. Therefore, there is zero (-0-) multiplier on reimbursable expenses.</p> <p><b>SUMMARY</b> Based on the fee structure presented above, we believe ATSR is offering strong incentives to become a Sourcewell member that will directly benefit Sourcewell clients.</p>	*
65	Describe any quantity or volume discounts or rebate programs that you offer.	<p>As is indicated in our fees, the larger the project and scope or the larger facilities square footage for an assessment project or study, the larger the discount.</p> <p>If ATSR is hired to provide a facilities conditions assessment, a long-range facilities master plan, bond referendum planning, and the final design and construction administration for resulting projects, the bond referendum planning and master planning services are subtracted from and credited to the overall final project, depending on the amount applicable to the final project.</p> <p>Likewise, if ATSR is hired for multiple services and projects, a discount is provided.</p> <p>Refer to Questions #63, #64, and Table #7 for additional information.</p>	*



66	Propose a method of facilitating "sourced" products or related services, which may be referred to as "open market" items or "non-contracted items". For example, you may supply such items "at cost" or "at cost plus a percentage," or you may supply a quote for each such request.	<p>Sub-consultants that ATSR may bring on to the team to deliver a client's total scope of work (e.g. civil engineer) would be the only type of "sourced" services.</p> <p>These services will be included in our overall fees that we propose for the specific scope the client needs and would not carry our typical 10% additional mark-up. Also, ATSR standard 10% administrative fee for any additional services required by the client would not be charged.</p>	*
67	Identify any element of the total cost of acquisition that is NOT included in the pricing submitted with your response. This includes all additional charges associated with a purchase that are not directly identified as freight or shipping charges. For example, list costs for items like pre-delivery inspection, installation, set up, mandatory training, or initial inspection. Identify any parties that impose such costs and their relationship to the Proposer.	<p>ATSR's goal is to provide streamlined comprehensive professional services to customers in our market sectors. Typical additional costs that are outside of our standard fee structure include reimbursable expenses (i.e., printing, mailing, mileage, travel, hotels, rental cars, etc.). For Sourcewell members, ATSR does not charge the standard 10% mark-up.</p> <p>Also, there can be outside services required that ATSR does not provide in-house or through consultants and/or is not covered by professional liability insurance that may be integral to a project or service performance. One example is discovering, evaluating, remediating any form(s) of hazardous materials. The client is responsible for addressing this topic and providing ATSR final reporting of resolution. Other examples include preparing topographic surveys and soil exploration borings for sites if needed. The client is responsible for providing third party consultants to perform these functions – ATSR can facilitate the coordination of surveys and soil borings.</p>	*
68	If freight, delivery, or shipping is an additional cost to the Sourcewell participating entity, describe in detail the complete freight, shipping, and delivery program.	<p>For professional services, costs for mailing plans, specifications, contracts or other items will be a reimbursable cost to the entity or client. ATSR does not charge the 10% mark-up for Sourcewell members.</p> <p>ATSR staff will travel on airlines and in vehicles to project sites in performing professional services. The cost for this transportation is a reimbursable expense to the project, invoiced to the client. ATSR is located in Minneapolis; Delta Airlines main central hub at MSP International Airport makes for very convenient air travel. ATSR has flown to Alaska, Hawaii, Pennsylvania, other areas in the U.S., Saudi Arabia, Jordan, and other countries for projects.</p>	*
69	Specifically describe freight, shipping, and delivery terms or programs available for Alaska, Hawaii, Canada, or any offshore delivery.	<p>For professional services, costs for mailing plans, specifications, contracts or other items will be a reimbursable cost to the entity or client.</p> <p>ATSR staff will travel on airlines and in vehicles to project sites in performing professional services. The cost for this transportation is a reimbursable expense to the project, invoiced to the client. ATSR is located in Minneapolis; Delta Airlines main central hub at MSP International Airport makes for very convenient air travel. ATSR has flown to Alaska, Hawaii, Pennsylvania, other areas in the U.S., Saudi Arabia, Jordan, and other countries for projects. Although travel to Canada has been limited, we are ready to perform projects there - our invoicing would be the same as for other locations.</p>	*
70	Describe any unique distribution and/or delivery methods or options offered in your proposal.	<p>Since our firm offers professional services, distribution of products is not applicable.</p> <p>However, we offer many digital communications and delivery options that may offset or eliminate physical delivery costs, travel costs, etc. including video conferencing, pdf email deliveries, cloud-based software submittals/documents accessible to all parties on the project. For many years ATSR has provided professional services internationally through digital video conferencing communications and email - time zone difference can be 8 to 10 hours, without any scheduling issue for the ATSR team.</p>	*



71	Specifically describe any self-audit process or program that you plan to employ to verify compliance with your proposed agreement with Sourcewell. This process includes ensuring that Sourcewell participating entities obtain the proper pricing.	<p>ATSR provides has redundancy self-audit protocols for contract implementation and invoicing that involves ATSR firm owners and our business office.</p> <p>ATSR project managers, who are also owners of the firm, review contract agreements regularly to understand all payment and discount conditions in place for the services rendered.</p> <p>Also, ATSR's invoicing department reviews the contract agreements for accurate interpretation of invoicing format, discounts, and processing.</p> <p>Further, prior to issuing invoices to ATSR clients, our accounting department requires that the ATSR firm owner - project manager reviews and initials each invoice for accuracy and progress of deliverables to the client.</p> <p>With each quarterly payment to Sourcewell, ATSR will copy all client invoicing with breakdowns to Sourcewell for transparency and your record-keeping.</p> <p>Finally, the ATSR business manager reviews accounts with contract agreements for accuracy of invoicing and services interpretation.</p>	*
72	If you are awarded an agreement, provide a few examples of internal metrics that will be tracked to measure whether you are having success with the agreement.	<p>For internal metrics, ATSR utilizes Deltek Ajera™ accounting software for project hours, costs, work-in-place, and unpaid invoices. Through Ajera, our project managers monitor instantly the impact of a project regarding its profitability and success.</p> <p>Deltek Ajera™ software tracks contract sum, change orders, C.O.% of contract, fee, project manager, % complete, invoiced, work-in-progress, contract amount remaining, % contract used, spent labor &amp; consultant, and deviation data for measuring project success.</p> <p>Project success is viewed through several lenses at ATSR. Through Deltek Ajera™, ATSR team members can view financial profitability and project progress. Through weekly in-house corporate meetings every project's schedule and status of deliverables is reviewed, as well as client satisfaction rating for measuring project success.</p> <p>ATSR will engage with Sourcewell to review all Ajera data reporting for analyzing project success and will engage with Sourcewell to implement strategies for increasing client satisfaction and project success.</p>	*
73	Provide a proposed Administration Fee payable to Sourcewell. The Fee is in consideration for the support and services provided by Sourcewell. The propose an Administrative Fee will be payable to Sourcewell on all completed transactions to Participating Entities utilizing this Agreement. The Administrative Fee will be calculated as a stated percentage, or flat fee as may be applicable, of all completed transactions utilizing this Master Agreement within the preceding Reporting Period defined in the agreement.	ATSR proposes a 1% to 2% administrative fee to be paid to Sourcewell. ATSR invoices clients monthly, so we expect quarterly payment to Sourcewell would be appropriate. However, if ATSR sees that this process is simple and streamlined, we are open to negotiating a reduced or zero (-0) administrative fee to Sourcewell.	*

Table 7: Pricing Offered

Line Item	The Pricing Offered in this Proposal is: *	Comments
74	The pricing offered is as good as or better than pricing typically offered through existing cooperative contracts, state contracts, or agencies.	(Also see ATSR Pricing Submittal in the Attached Document Section). ATSR recognizes that there are in-house cost savings for ATSR as a Sourcewell member providing professional services to clients (Services are described in Question #63/#64/#65 in Table 6 of this RFP). With this in mind, we offer a discount on fees for Sourcewell member clients as follows (all pricing is listed

in U.S. currency):

FACILITY PHYSICAL  
CONDITIONS ASSESSMENTS  
ATSR bases fees for this  
work on building area  
assessed. ATSR fees are  
discounted for Sourcewell  
members and structured as  
follows:  
[0–500,000 square feet (SF)  
of building area (includes  
site): 20% discount off 15  
cents/SF= 12 cents/SF\*]  
[500,001–1,000,000SF of  
building area (Includes site):  
20% discount off 10  
cents/SF= 8 cents/SF\*]  
[1,000,001+ SF of building  
area (Includes site): 20%  
discount off 7 cents/SF= 5.6  
cents/SF\*]  
\*Plus reimbursable expenses  
(i.e., mileage, printing, cell,  
travel)

LONG-RANGE FACILITIES  
MASTER PLANNING  
ATSR provides long-range  
facilities master planning  
services that involve  
committees, user group  
engagement, evaluations of  
program adequacy and space  
utilization, and conceptual  
design options with costs.  
Fees are negotiated based  
on the scope and services  
requested. ATSR provides a  
20% discount off standard  
fees for Sourcewell members,  
plus reimbursable expenses.

BOND REFERENDUM  
PLANNING  
This professional service  
prepares the client for a  
bond referendum (i.e., refine  
recommendations, finalize  
facilities plan/costs,  
collaborate with financial  
advisor, prepare documents,  
develop strategies). Fees  
ranges are negotiated based  
on the scope of services  
requested. ATSR provides a  
20% discount off standard  
fees for Sourcewell members,  
plus reimbursable expenses.

FOOD SERVICE FACILITIES  
PLANNING  
ATSR specializes in food  
service facilities planning.  
Fees are negotiated based  
on the scope of services  
requested. If services are  
part of a design for  
construction, fees are  
included in the overall  
building project fee. ATSR  
provides a 10% discount off  
standard fees for Sourcewell  
members, plus reimbursable  
expenses.

DESIGN AND CONSTRUCTION  
ADMINISTRATION SERVICES  
As described earlier in the proposal, ATSR is a full-service planning/architectural/engineering firm. For comprehensive services, compensation is typically based on a percentage of construction cost, plus reimbursable expenses. Alternatively, a fixed fee arrangement or other approach may be agreeable. ATSR provides a 10% discount off standard fees for Sourcwell members, plus reimbursable expenses (which are typically \$1,500 to \$1,800 per \$1 million of construction cost).

FF&E DESIGN, PROCUREMENT, AND COORDINATION  
ATSR services options are as follows:  
Option One - Comprehensive Services:  
ATSR leads the furniture procurement process (i.e., finalize furniture design/selections, prepare bid documents, issue documents to vendors and obtain bids, review shop drawings, coordinate installation, perform punchlists). ATSR provides a 10% discount off standard fees for Sourcwell members, which is typically based on a percentage of furniture construction cost, plus reimbursable expenses.  
Option Two - Design/Support Services:  
ATSR works with the client's furniture vendor to procure furniture (i.e., share layouts, meet with vendors, assist with colors, review layouts, coordinate as required). ATSR provides a 10% discount off standard fees for Sourcwell members, which is typically 30% of the overall project fee structure (i.e., based on a percentage of furniture construction cost) due to reduced scope from Option One, plus reimbursable expenses.

COMMISSIONING SERVICES  
ATSR provides services on mechanical/electrical systems (i.e., designed by ATSR or a different firm) for design, construction, and post-construction phases. Compensation varies depending on the scope of services provided. ATSR provides a 10% discount off standard fees (i.e., based on

a price per square foot of spaces commissioned), plus reimbursable expenses.

SUMMARY

In summary, ATSR offers a 10% to 20% discount on fees and compensation for professional services as described above to Sourcewell members. For services rendered to Sourcewell members on an hourly basis, ATSR offers a 10% discount on hourly rates, subject to annual adjustment. For example:  
Grade 1 Principal:  
Standard(S)=\$220;  
Discount(D)=\$198.00  
Grade 2: Principal: (S)=\$240; (D)=\$216.00

Grade 1 Project Manager / Architect / Engineer:  
(S)=\$185; (D)=\$166.50  
Grade 2 Project Manager / Architect / Engineer:  
(S)=\$220; (D)=\$198.00

Grade 1 Technician / Designer: (S)=\$140; (D)=\$126.00  
Grade 2 Technician / Designer: (S)=\$175; (D)=\$157.50  
Grade 3 Technician / Designer: (S)=\$195; (D)=\$175.50

Clerical: (S)= <\$150; (D)= <\$135.00

COMBINED SERVICES OFFER

When Sourcewell members combine services offered by ATSR, concurrently, an additional 5% discount applies, based on services and scope. We are confident that Sourcewell members will achieve high quality services at discounted ATSR fees for professional services provided. The larger the project and scope or the larger facilities square footage for an assessment project or study, the larger the discount.

CREDITS

Additionally, if ATSR is hired to provide a facilities conditions assessment, a long-range facilities master plan, bond referendum planning, and the final design and construction administration for resulting projects, then the bond referendum planning and master planning services fees are credited to the overall final project fee, based on the amount

		<p>applicable to the final project.</p> <p><b>REIMBURSABLE EXPENSES</b> Regarding reimbursable expenses, ATSR foregoes the 10% (i.e., 1.10) administrative multiplier typically added to the expense for mileage, printing, cell, travel. Therefore, there is zero (-0-) multiplier on reimbursable expenses.</p> <p><b>SUMMARY</b> Based on the fee structure presented above, we believe ATSR is offering strong incentives to become a Sourcwell member that will directly benefit Sourcwell clients.</p>
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**Table 8A: Depth and Breadth of Offered Solutions (200 Points)**

Line Item	Question	Response *
75	Provide a detailed description of all the Solutions offered, including used, offered in the proposal.	<p><b>SERVICES AND SOLUTIONS OFFERED</b></p> <p>One of ATSR's key service differentiators is our agility in tailoring customized services to clients with 80 years of continuous operation and client satisfaction. Our in-house services coupled with our highly qualified long-term consultant involvement sets ATSR apart from other professional services planning/architectural/engineering firms. To illustrate how clients benefit from ATSR's knowledge and expertise, we offer a detailed description of the services and steps we provide to exceed client expectations.</p> <p>The ATSR team provides a full spectrum of services, including:</p> <ul style="list-style-type: none"> <li>Educational adequacy studies</li> <li>Facility analysis   Space utilization</li> <li>Facilities condition assessments</li> <li>Facilities master planning</li> <li>Pre-referendum planning/assistance</li> <li>Architecture and Interior Design</li> <li>Forward-thinking future-ready design</li> <li>Educational facility planning</li> <li>Mechanical/Electrical/Plumbing engineering</li> <li>Technology design (voice, data, video, security, infrastructure)</li> <li>Landscape architecture   Site development</li> <li>Sustainability design   LEED design   Energy rebates processing</li> <li>Project management and scheduling</li> <li>Construction cost estimating   Project cost estimating</li> <li>Fixtures, Furniture, and Equipment (FF&amp;E) design, specifications, and procurement</li> <li>Food service design / Hardware design   Roof design</li> <li>Specifications for all disciplines noted above</li> <li>City/State agency approval management and processing</li> <li>Construction administration</li> <li>Commissioning</li> <li>Punch-lists and warranty closeout services</li> <li>Civil engineering (through our consultant)</li> <li>Structural engineering (through our consultant)</li> <li>Acoustical design (through our consultant)</li> <li>Demographics Analysis (through our consultant)</li> </ul> <p>As a boutique firm, clients may select the services needed as well as the level of depth of scope desired to accomplish their objectives. ATSR has an extensive amount of experience in planning, programming, design, and construction administration to lead, guide, and inspire clients to successful solutions. We have comprehensive experience in leading an entire project scope, from facilities assessment to final owner occupancy of construction projects – the key is to serve clients to achieve their goal.</p> <p>Regardless of the project type and scope, ATSR leads the process through consistency and follow-through with the following activities and attitudes:</p> <p>[Honesty/Timeliness/Accuracy]</p>

It's all about the client! ATSR sincerely and enthusiastically embraces excellence in quality and service to the client. Our mission is to develop a positive project experience for clients in the following ways:

- Keep you informed via transparent communications
- Be proactive about everything
- Be truthful so the client can make informed decisions
- Go the 'extra mile' to exceed expectations
- Be an advisor, resource, and friend
- Create solutions through highly collaborative engagement

#### [Participatory Meetings]

To start at the beginning, for all projects and services, ATSR partners with the client to finalize a written agreement for going forward. We organize an introductory meeting with key stakeholders to confirm and refine project scope and determine how ATSR services (and potentially add-on services) will effectively and efficiently benefit the client for their project. As the project progresses, our team engages with committees, user groups, and client leadership in purposeful meetings for idea exchange and decision making.

#### [Ongoing Transparent Communications]

ATSR believes that our role is to serve the client to the best of our ability – that is why we are in business. Our team leaders are expected to have daily contact with the client (e.g., via in-person contact, phone, email, video conferencing), if only to provide project status reporting. The more we get to know our client, the more we can serve as their agent and best serve their interests.

Here is what one of our ATSR clients says about ATSR's unique participatory planning approach:

"I have only positive things to say about our experience with ATSR. From the facilities audit and master planning process to concept drawings to collaborative design work to the selection of the general contractor, the ATSR team was exceptional in their product and service delivery." Dr. Heidi Eliopoulos, Superintendent of Schools (former), Chippewa Falls Area Unified School District (current Superintendent of Schools for The School District of Altoona)

#### PLANNING

Facilities conditions assessments and long-range facilities master plans consider many components including physical conditions, program adequacy of spaces (e.g., regarding building square footage, furniture, equipment, utilities, site components), and how the client is currently using the space. Building users need to have well thought-out and operational environments to engage individual and collaborative productivity with appropriate tools/systems at their disposal. ATSR engages our G.E.M.S. (i.e., Gather Information, Evaluate Data, Model Findings, Solve Creatively) process to 'uncover every stone' in evaluating your facilities and 'right-sizing' to be future-ready.

#### FACILITIES CONDITION ASSESSMENT (FCA)

ATSR leads the client through the FCA process. Our process of collection-review-analysis is based on excellent communications, accuracy/consistency, inclusion, and developing long-term solutions. ATSR's description of the FCA is as follows:

#### [Committee Formation]

We recommend forming an FCA steering committee (and executive committee) as the decision-making body for the project, through bi-weekly/monthly meetings led by ATSR. With the formation of the committees, we meet with the stakeholder team to confirm the refined steps in the process.

#### [Background Understanding]

It is vital to understand the client's curriculum/program so that our FCA considers how the facility is utilized. We meet with user groups and facilities personnel to understand the expected performance of systems, components, and equipment. ATSR specialists share our expertise in forward-thinking future-ready school facilities/systems trends, making clients aware of the latest technologies and products/systems for educated decision making.

#### [FCA Matrix and Basis]

ATSR has standard matrix templates for conducting a FCA, but, since each client's needs differ, we generate categories, criteria, ratings levels, priorities, sampling, and other metrics with the client prior to commencing actual building assessments and confirm all category types and evaluation metrics with the client prior to moving ahead on the actual FCA. Our team is comprised of specialists, suppliers, manufacturers, and/or consultants that specialize in each component/category. With our team, the client has access to experts of each component, to gain insight on product/component/system options that best serve the client long-term.

ATSR generates standardized and client-specific category topics with the client to assure that all needed facilities conditions are included, such as physical elements for site components (e.g., grading, parking lots, roadways, play fields), exterior building envelope (e.g., roofs, walls, windows, entrances), interiors components (e.g., floors, walls, ceilings, partitions, doors, hardware), special equipment (e.g., elevators, gym equipment, pool equipment, operable partitions), FF&E (e.g., furniture, equipment, display, signage, markerboards), heating-ventilation-air-conditioning systems, plumbing systems, temperature controls, electrical power and lighting systems, and technology (i.e., voice, data, video, security, infrastructure) systems.

Planning criteria are essential to generate with stakeholders, to make sure the FCA is evaluated based on the client's expectations and requirements. The planning criteria includes requirements to meet the client's facilities standards (e.g., for roof and wall insulation values, ventilation air exchange and cfm delivery, quality standards for hardware).

#### [Ratings Levels and Priorities]

It is vital to establish ratings levels for components prior to embarking on the FCA; determine acceptable quality and performance levels of components and systems. With ATSR's trained staff specialists, we guide the client in determining conditions levels (e.g., poor, acceptable, excellent) and criteria for determining the ranking. We guide the client in establishing and defining the "windows of time" for 5-10-15-year priority replacement timeframes.

#### [Pilots and Sampling]

ATSR conducts an initial pilot assessment on a building and reviews with the client the conditions for final refinement of process, ratings, sampling, cost estimates, and priorities. We find that it is revealing for the client to see an initial pilot report to refine assessment protocols for the entire FCA moving forward. Depending on the situation and scope, sampling may be introduced for certain categories for evaluating components. For example, several classrooms on each floor level of a facility may be sampled in the FCA, with results applied to adjacent similar spaces. This approach, which is determined by the client, may reduce fees.

#### [Actual FCA Walkthrough]

ATSR schedules each building to access and assess. Based on the project size or number of facilities, we send out several teams to collect the data and input it into the software. Team members confirm with each facility for scheduling and maintenance personnel notification of the assessment. Team members wear official identification badges for safety and security reasons. The actual assessment is then conducted. We hold weekly/bi-weekly meetings with the client to review progress and details revealed by each discipline for each facility.

#### [Timing and Life Cycle Evaluation and Cost Estimating]

For items evaluated, we discuss quality expectations, replacement scheduling, and life cycle with the client and prepare construction/project cost estimates with inflation for immediate/future replacement planning. For cost estimates, we include construction inflation multipliers to incorporate for 5-10-15-year replacements.

For cost estimating, ATSR's assumptions are based upon building area/volume, design, and systems/materials choices. Value-conscious architecture starts with design features and systems/materials selections. We accurately estimate and update costs as needed to assure completeness, based on the following methods:

- Cost per square foot analysis (for building overall and for types of spaces)
- Unit Costs
- Quantity take-off estimates for specific items
- Best-value engineering
- Life-cycle costing (initial vs. long-term costs)
- Rebates for offsetting specific systems costs

During project refinement, project cost options are discussed as a measure to control unforeseen bidding climate conditions that may affect budgets and other cost factors. For estimating future construction inflation, we utilize the Engineering News Record (ENR) Historical Building Construction Cost Index and other construction indices.

For cost estimating FCAs, ATSR estimates construction cost and overall project cost, including inflation – there are many components that make up the project cost. For budget preparation, we partner with the client to identify all costs of a project. For estimating, ATSR includes the following components:

- Construction cost and construction inflation
- Professional services fees
- Furniture, fixtures, and equipment budgeting
- Technology (voice/data/video/security) costs
- Permits and municipal/state utilities charges
- Surveys, soil borings, environmental services
- Off-site development costs



- Project contingency
- Alternative funding sources
- Energy rebates/paybacks

#### [Progress Reporting]

As evaluations are conducted/documented, ATSR revises and reviews results/proposals with the client prior to refining and inputting into the software. Consistency is essential; ATSR has trained facilities specialists who view with the "same set of eyes" for each facility. Project reporting is worked on with client input/requirements, with options and scenarios developed collaboratively for a final report.

#### [Software and Spreadsheets]

During the FCA, ATSR inputs findings and solutions into our in-house spreadsheets, creating a list of needed facilities work for each facility. The content in the spreadsheet includes the facility category number, description of the condition and the recommended improvement, unit of measure for quantity of work involved, unit cost, construction cost, project cost, priority level, condition rating, funding source, projected cost inflation factor, and year for work to be completed. All cells in the spreadsheet are manipulatable and can be edited, managed, and updated by the client or ATSR ongoing after the FCA is completed.

#### SPACE UTILIZATION STUDIES / PROGRAM CAPACITIES OF BUILDINGS

ATSR is a specialist in advising and performing space utilization studies and program capacities studies of facilities, especially PreK-12 spaces with particular expertise. Information acquired from this type of project is typically used for developing proposals for facilities expansion/right-sizing for educational entities, with which ATSR has extensive experience.

To begin, ATSR develops/confirms/refines the client's planning criteria for space functions, sizes, occupants, equipment needs, and standards. For educational entities, ATSR analyzes the school master schedule to determine grade levels served, periods per day, core courses offered, elective courses offered, semester breakdown, class size and capacity, used and open periods per day per room, special education programs, extra-curricular activities, and other technical program aspects of the facility.

After analysis has occurred, space utilization for each space is illustrated graphically on floor plan layouts for the client to view and discuss with ATSR. A question-answer session is conducted to refine the findings. Also, ATSR develops space utilization spreadsheets to determine program capacity of each space and building and how the building is currently utilized. The analysis reveals ways to improve the utilization of spaces and options for adjusting program capacity up/down, considering class size, periods per day, and other idea scenarios. Typically, upon completion of a space utilization and program capacity study, studies for program adequacy and concept idea modeling occur in order to conclude with an overall facilities solution.

#### PROGRAM ADEQUACY ANALYSIS OF SPACES

For these services, ATSR specializes in PreK-12 facilities. Frequently clients request ATSR to evaluate buildings/sites on educational adequacy of spaces for program delivery. To begin, ATSR studies the curriculum, master schedules, and core spaces of the school. A tour is conducted of the building and confirmation is made of existing spaces and adjacencies between spaces. ATSR presents a future-ready facilities workshop to engage the client in how programs change over time and how to prepare facilities for the future. User input is provided regarding environments for individual, team, small groups, classrooms, and large groups – discuss/learn how these environments may be improved to enhance performance for all users for future-ready purposes. Standards and guidelines are established for spaces to support the program (e.g., square footage, class size, adjacencies, quantities of spaces). Each space is analyzed for suitability to support the program and function, evaluated against the established standards and guidelines. Tables and matrices are generated to graphically illustrate the adequacies/inadequacies of spaces. From here, scenarios are explored for resolving inadequacies for spaces to properly support the program and curriculum. Recommendations and concepts of appropriately sized spaces, based on guidelines/standards, are prepared for client feedback and discussion. Options are determined for needed physical improvements at the building.

ATSR leads the client in establishing objectives for modeling facilities concept options for the immediate and future needs. We engage the client in input/feedback on gathered information and long-range options to explore. ATSR creates/critiques options, with modifications and/or add options for final recommendations - through consensus. ATSR generates facilities recommendations for potential renovations, upgrades, or modifications with the client.

#### LONG-RANGE FACILITIES MASTER PLANNING

ATSR is frequently hired to provide comprehensive long-range facilities master planning services for customers, a professional service that typically involves task

force committees, user group engagement, evaluations of program adequacy and space utilization, as well as conceptual design options with cost estimates for immediate and future planning purposes.

#### BOND REFERENDUM PLANNING

This professional service involves working with the customer's governing board (e.g., school board) to prepare the client for presenting a bond referendum proposal to voters. ATSR refines recommendations from the long-range facilities task force or agency department and finalizes the recommended facilities plan and cost estimates for a referendum. We work with the client's financial advisors on taxpayer cost implications and prepare government-required (e.g., State Department of Education document submittals) for approval to proceed with a public referendum. ATSR and our specialist consultant develop strategies and vehicles for marketing communications to voters. Also, informational materials and graphics are part of our service in this scope.

#### FOOD SERVICE FACILITIES PLANNING

ATSR evaluates existing conditions of the entire food service facility, based on criteria established collaboratively by client and ATSR for immediate and future needs. From these conditions assessments, options with cost estimates are created by ATSR for addressing inadequacies of the space(s) for improved efficiency and delivery of food product to the users.

#### DESIGN AND CONSTRUCTION ADMINISTRATION SERVICES

With ATSR's comprehensive planning/architectural/engineering services in architecture, interior design, mechanical engineering, electrical engineering, site development, technology, food service design, interior design, FF&E, cost estimating, and construction administration, we lead and guide clients through the entire design and construction of a project. ATSR engages in all phases of a project as follows:

##### [Planning/Design Process]

ATSR provides a participatory planning process for the project. We recommend the client form an executive committee for high-level leadership direction, and a project steering committee for decision-making of project development. Throughout the process, we lead the meetings through transparent sharing of information, with continuous committee input and feedback, developing options that address the client's needs.

##### [Programming Phase]

Space needs drive the design. ATSR analyzes the client's program/curriculum to develop a starting point for outlining project space requirements. The space program is developed alongside the prescribed budget parameters. Tours of are conducted of similar projects to collect ideas. Program confirmation by the steering committee occurs during this phase. Focus groups (e.g., subject areas, special services, physical education, food services, departments) provide input in determining space needs decision-making.

##### [Schematic Design Phase]

ATSR shares our expertise with the client for future-ready designs. Our team prepares design concept options reflecting the client's dreams and space needs. Concept options are reviewed with the steering committee and focus groups, which is communicated to the community for the referendum (Note: The development of the concept option at this stage varies based on client input). The concept is then developed into schematic design. Exterior images, preliminary code analyses, mechanical/electrical/technology systems, site concept, and concepts of building materials are prepared. 3-dimensional computer models are created for the client to virtually 'walk through' spaces. Cost budgets are confirmed with the client prior to the next phase.

##### [Design Development Phase]

ATSR leads the steering committee and focus groups on developing plan layouts, systems, and space function/operation. With the client's team, decisions are made regarding materials selection, architectural systems, mechanical/electrical/technology systems, and cost estimates. All items are reviewed/approved prior to proceeding with the next phase. 3-dimensional computer models are refined for virtual walk-throughs and decision-making.

##### [Construction Documents Phase]

Upon the client's approval, ATSR proceeds with preparing documents for bidding. ATSR communicates with the client to review details/systems that need additional discussion. Thorough details and specifications are developed for project construction. Budgets are confirmed, project alternates are created/refined, and construction sequencing is confirmed.

##### [Pre-bid / Bid / Award Phase]

A bidder's experience, reputation, and integrity are essential attributes for a

successful project. We support the process to review the capabilities of bidders for a successful project. Also, during the bid phase, ATSR manages addenda, approved-equal submittals, and bid clarifications. During bid opening and award, we lead the process and prepare award recommendations and contracts.

#### [Construction Administration Phase]

ATSR manages contractor contracts and submittals and leads pre-construction meeting(s) and weekly/bi-weekly progress meetings, with the client. ATSR holds meetings to review progress, scheduling, clarifications, and coordination of work with the construction entity and client. ATSR evaluates monthly contractor payment applications. Everyone works as a team for success. ATSR's field administrator provides on-site observation, serving as the client's representative, monitoring compliance of construction documents. Contractors appreciate ATSR's in-house multi-disciplines in construction because ATSR architects, engineers, and systems specialists serve as a valuable resource. At project substantial completion, ATSR prepares punchlists for any construction corrections. Final review is made for retainage reduction and final project closeout as agreed by all parties.

#### [Post Construction Phase]

ATSR's approach streamlines activities for efficient project close-out. We work with the contractors to finish the project in a timely manner with no 'loose ends' unaddressed. We assist with on-site training in systems. We review operations/maintenance procedures with you, evaluating building performance ongoing and prior to the 1-year warranty expires. We want to be the 'first call' from the client, to serve as a resource after warranty.

#### FF&E (FIXTURES, FURNITURE, AND EQUIPMENT DESIGN, PROCUREMENT, AND COORDINATION)

ATSR typically offers several options for this service as follows:

Option One - Comprehensive Services: In this option, we lead the furniture procurement process. We work with the client to finalize the furniture design from the design services above and determine specific furniture pieces. We prepare documents and specifications for quoting or bidding. We issue the documents to desired furniture vendors and obtain quotes or bids. We compile the numbers, assemble them according to the budget and work with you on which items you accept to ensure the budget is maintained. We assist with any shop drawings, help coordinate installation schedules with contractors and vendors and perform punch lists after installation.

Option Two - Design/Support Services: In this option, we work alongside the client's furniture vendor to procure furniture. We share any preliminary furniture layouts and what we learned during the architectural user group meetings and continue to be involved with furniture meetings with your vendor and staff. This option would include assistance with color selections, layout review, and coordinating with the vendor as required to ensure a successful project.

#### COMMISSIONING SERVICES

ATSR provides commissioning services on mechanical and electrical systems, whether ATSR-designed or designed by a different firm(s). ATSR integrates the commissioning services during the design, construction, and post-construction phases, working closely with the ATSR design team (or other firm if ATSR is not the designer) to meet the standards and codes requirements for the systems. Commissioning includes verification of compliance with HVAC fresh air, temperature controls, air handling unit set-up and power requirements, lighting occupancy controls, etc.

#### SUMMARY

ATSR's 80 years of continuous operation and service to clients provides the client with confidence that ATSR provides the highest quality services for the project. ATSR client testimonials reflect ATSR's philosophy and attitude to our profession, serving clients, and in running our business:

"...you can't go wrong with ATSR - they are fantastic to work with! They come up with great designs that are also economical from a cost standpoint, but will be durable to also stand the test of time. They have great staff and listen to you to put what you want in a building, not some pre-planned idea they want to build. We have used them for \$180+ million worth of additions/renovation projects at ISD 276 for 17+ years, and we've received numerous awards for design excellence for our projects. You won't regret hiring ATSR as your architect! The people are simply great! We have nothing negative to say about ATSR - our experience has been great!" Paul Bourgeois, Executive Director for Finance and Operations, Minnetonka Public Schools

"The team at ATSR have been true partners in the H-BC School District's quest to provide facility/building improvements for the betterment of the District's education programming. Their professionalism and K-12 expertise have assisted us greatly with our project! Thank you for catering to our needs!" Todd Holthaus, Superintendent

		<p>of Schools, Hills-Beaver Creek Public Schools</p> <p>"What separates ATSR from the competition is the complete partnership approach you bring to the district. A leader in school design, ATSR delivers extensive experience and a complete understanding of a school district's needs." Chuck Holden, Chief Operations Officer (former), Anoka-Hennepin Public Schools, ISD #11</p> <p>"...the most frequent comment I hear is 'wow it's such a sense of pride...this is ours.' It's been so important to be able to hold true to what our community voted for and to create something they're proud of...A huge thanks to ATSR for willing to listen.... You may think that it's just automatic, but it really isn't. ATSR held true to our vision and helped us realize our vision even clearer." Teri Preisler, Superintendent of Schools (former), Tri-City United (TCU) School District</p>
76	<p>Within this RFP category there may be subcategories of solutions. List subcategory titles that best describe your products and services.</p>	<p>Much of this subcategory information is detailed thoroughly in Question #75. However, within the major categories of services described in Question #75, ATSR provides professional services within the following subcategory solutions with a high degree of expertise:</p> <p><b>FACILITIES CONDITION ASSESSMENT (FCA)</b>  For the FCA matrix and components studied, ATSR includes these subcategories for conducting assessments and solutions (plus additional subcategories tailored to fit the client's needs and requirements):</p> <ol style="list-style-type: none"> <li>1. Site Hard Surfaces: Asphalt paving, concrete walks, and curbs/gutters</li> <li>2. Site Activity Spaces: Playgrounds, athletic fields, supporting activity structures (e.g., dugouts, fences, bleachers), and hard surface play areas</li> <li>3. Site Drainage/Landscaping: Grass/turf, trees/shrubs/planting, irrigation systems, monument signage, storm drainage, and accessibility (ADA)</li> <li>4. Exterior (Building Envelope): Roofs, wall systems, tuckpointing/sealants, doors/hardware, curtainwall/storefront, window systems, louver/screenwall/fenestration, exterior bleachers/grandstands, and painting/plaster</li> <li>5. Interior (Building): Doors/hardware/windows, flooring, ceilings, wall finishes, tile applications, code deficiencies, accessibility (ADA), secure/controlled entries, remodeling, and additions</li> <li>6. Interior (Fixed Equipment): Interior bleachers, lockers, stage curtains, gym curtain dividers, basketball backstops, wall pads, markerboard/tackboard, display cases, folding divider walls, cabinetry, cubbies, restroom partitions, wall-mount café tables, ceiling fans, window treatments, kitchen equipment, cold storage rooms, pool equipment, scoreboards, and videoboards</li> <li>7. HVAC (Heating, Ventilation, Air Conditioning, and Temperature Controls): Boilers, motors/controllers/pumps/systems/ VFDs/feeders, fuel oil systems, HVAC piping, condensate, valves, heat exchangers, pumps (i.e., hot water, steam, chilled water, circulation), air handling units, terminal units, make-up air units, exhaust fans, liquified petroleum systems, water treatment, ductwork (i.e., hard, plenum, cleaning, pressure testing), air outlets/inlets, balancing system, cooling systems (i.e., chillers, pumps, ice storage, cooling towers, gas-fired absorbers), roof-top units (i.e., DX, split, spot coolers), dust collection, pools (i.e., ventilation, dehumidification, plate exchanger), ice area chiller systems, and pipe and duct insulation</li> <li>8. Plumbing: Motors/controllers/VFDs/feeders, domestic piping/labeling/conditioning, isolation valves, fittings/couplings, sanitary piping, sump pumps, lift stations, storm piping, rainwater leaders, plumbing fixtures, wash fountains, showers, drinking fountains, fire suppression, compressed air systems, fume hoods plumbing, pools (i.e., pumps, heat exchangers, filter systems, drainage, chemical fee), ice arena chiller systems, and domestic water heaters</li> <li>9. Electrical: Main/medium voltages, transformers, metering, arc-flash systems, panels (i.e., distribution, labeling), branch circuits (i.e., computer, media), fire alarm, technology accommodation, low voltage systems, emergency generators, battery backup systems, inverters, and sound systems</li> <li>10. Lighting: lamps/ballasts/controls, emergency lighting, exit signs, special purpose lighting (i.e., theaters, gyms, pools, other), security lighting, parking lot lighting, and exterior athletic lighting (i.e., lamps, standards, bases, controls)</li> <li>11. Security: Intrusion detection, access control, surveillance, and voice and PA communication systems</li> <li>12. ADA Accessibility: Site access, building access, and specific needs</li> <li>13. Building Program Capacity: Comparative standards, lower class sizes, parking quantities, space utilization (i.e., learning spaces, core spaces, site), and portable classroom impact</li> <li>14. Program Needs: Technology (i.e., voice, data, video, infrastructure), teaching station adequacy, flexibility (i.e., staff, small group, large group), community needs/spaces, site play areas (i.e., football, baseball, softball, playgrounds, site size), and support spaces</li> <li>15. Security/Safety: Lighting (i.e., interior, exterior), emergency backup systems, access control, intrusion detection, surveillance, secured access entry, communications, circulation (i.e., bus, car, pedestrian), and site issues</li> </ol> <p><b>DESIGN AND CONSTRUCTION ADMINISTRATION SERVICES</b></p>

		<p>For the design and construction administration services, ATSR includes these subcategories for performing the scope of work for each phase (plus additional subcategories tailored to fit the client's needs and requirements):</p> <p>[Government Submittals] ATSR manages the governmental agency process which typically includes introductory meetings, document application submittals, planning commission meetings, city council meetings, state/local preliminary code compliance reviews, agency meetings, and required preliminary drawings/specifications submittals.</p> <p>[Surveys and Soils] ATSR manages the process for the client to acquire property surveys (i.e., topographic, boundary) and soil borings of the project site, providing guidelines and parameters for the consultant to follow. ATSR reviews the deliverables for application to the project.</p> <p>[Sustainability Supplements] For LEED green and net-zero projects, ATSR provides services for adherence to ratings and points systems for the certification process. We hire and manage consultants needed for specialty areas to achieve the ratings requirements.</p> <p>[Agency Plan Review] ATSR submits bid drawings/specifications to state/local agencies for final plan review and code review prior to issuance of the building permit. We communicate with potential bidders for bid coverage. Also, ATSR submits applications for sewer/water accessibility charges to state/local commissions per governmental requirement.</p> <p>[Construction Administration Supplements] During construction, ATSR receives all products and samples from the contractor(s) and prepares interior colors options to the client for final decisions. A color schedule is prepared and issued to the construction manager and contractor(s). ATSR processes all Architect's Supplementary Information (ASI) forms, Request for Change (RFC) forms, Change Order forms, and other documents for communicating information to all parties. ATSR serves as Initial Decision Maker for objective evaluation of claims.</p> <p>COMMISSIONING SERVICES ATSR provides subcategories of commissioning services including new commissioning, re-commissioning, retro-commissioning, monitor-based commissioning for clients' facilities. ATSR also serves clients as a forensics specialist to assess operational performance issues of third party entities.</p>
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Table 8B: Depth and Breadth of Offered Solutions

Indicate below if the listed types or classes of Solutions are offered within your proposal. Provide additional comments in the text box provided, as necessary.

Line Item	Category or Type	Offered *	Comments
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77	Facility and building condition assessment and auditing	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR performs FCAs with specialized in-house professional staff. Our long-term consultants in structural and civil engineering support this effort. We have performed thousands of FCAs for school districts and governmental agencies. Our FCAs lead to successful building bond referenda passage and/or projects through state-funded annual allotments provided to school districts and other agencies.</p> <p>ATSR develops our FCI matrix for our clients to compare other facilities in their categories (e.g., elementary schools, middle schools, high schools for K12 clients) for purposes of assuring program and functional equity. The tools are developed in-house by ATSR and are user-friendly for clients to manage at no annual cost or for ATSR to manage.</p> <p>ATSR is a boutique firm that can address a full scale FCA that incorporates all categories listed in the proposal and can provide focused assessments that only involve special categories (e.g., HVAC, accessibility, roofing) for clients. ATSR will tailor the FCA to meet the client's needs.</p>	*
78	Energy, utility, and emissions assessment and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR's in-house mechanical engineering and electrical engineering team provides services for energy, utilities, and emissions assessments and planning. Our team designs facilities through energy modeling tools and then monitors the facility's performance annually after project completion and owner occupancy. Performance reporting is provided to the client, with recommendations for refinement to achieve additional operational energy benefits.</p> <p>ATSR's team also specializes in evaluating energy and utilities usage and emissions for existing buildings. We acquire energy usage data from the client and study options for improving consumption and emissions that meet and exceed standards. Based on the type of system, we offer options for improvements that are low-hanging fruit as well as long-term remedies to lower energy costs and improve indoor air quality.</p> <p>ATSR performs energy audits for many school districts, providing payback calculations and utilities agency involvement for grants/rebates and other funding credit options. We do this service with phasing and sequencing of improvements in an overall master plan.</p>	*



79	Site, safety, and code inspections	<div><div><input checked="" type="radio"/> Yes</div><div><input type="radio"/> No</div></div>	<p>Site, safety, and code inspections are services provided by ATSR – they are typically conducted as part of the FCA process. At times, a client requests separate services for this topic.</p> <p>For site inspections, ATSR's team consists of a landscape architect, civil engineer, electrical engineer, and for schools an education program specialist. Included in site inspections includes drives, parking lots, play fields, drainage, turf, lighting, retention ponds, and program utilization.</p> <p>For safety and code inspections, ATSR has in-house specialists highly knowledgeable in the International Building Code (IBC), Americans with Disabilities Act (ADA), NFPA, ASHRAE, National Electric Code, Plumbing Code, and others. Our staff is trained in these codes and provides training to other professionals. Examples of scope typically includes exterior accessibility (e.g., ramps, parking stalls, signage, lighting), interior accessibility (e.g., toilet rooms, accessible workstations, ramps, railings, hardware), building code evaluation (e.g., exit distances, occupant loads, fire rating requirements, dimension widths/lengths, energy code criteria), and mechanical-electrical-plumbing code evaluation (e.g., compliance with ASHRAE, indoor air quality, fixture counts, and emergency lighting).</p>
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80	Space utilization and planning	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR is a specialist in this area, especially for PreK-12 education. We are nationally recognized resources, presenting nationally at school facilities conferences and authoring in national education magazines. We share our knowledge of education directions in program delivery and space functions. Since 98% of annual work is PreK-12 education, we perform all these services in-house. We utilize resources include A4LE, EDSpaces, and many other resources to supplement ATSR specialists extensive experience.</p> <p>For establishing space planning criteria, ATSR works with state guidelines, best practices, school district standards, and ATSR forward-thinking and future-ready data for school space utilization and planning studies. We push clients to think about class size, capacities, acreages, core spaces, etc. in determining space utilization and capacities.</p> <p>For planning, ATSR specialists create multiple options and case scenarios for helping clients explore building capacities, expansion needs, new facility needs, closures, and consolidation options. It is vital for clients to have journeyed with ATSR for a solution that can be defended in front of the general public and voters, creating the best solution at the time with the highest degree on consensus through participatory engagement and decision-making.</p> <p>ATSR prepares final reporting to governing agencies (e.g., school boards) for documentation and record. Along with recommendations, concepts and cost estimates are provided for a comprehensive solution and package.</p>	*
81	Geographic information system (GIS) services	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR does not perform GIS services in-house. For these services, we would need to hire an outside firm consultant.</p> <p>However, we are very comfortable working with the data generated from GIS, especially in the area of PreK-12 education facilities locations, capacities, class size ratios, etc.</p> <p>During ATSR's 18 years (2006-current) of designing USAID-JORDAN public schools projects (designing 90 new schools throughout the Kingdom of Jordan), ATSR created planning criteria and data requirements for GIS consultants to provide statistics. ATSR utilized the data generated to select appropriate sites for constructing new schools (typically for 1,000 students for each new school), based on population, enrollment statistics, current overcrowding ratios, male-female student quantities, walker distances, and other GIS data metrics.</p>	*

82	Feasibility, sustainability, and lifecycle assessment	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>One of the benefits of ATSR services is our comprehensive in-house collaboration of architectural, site development, mechanical, electrical, and technology disciplines. Our seamless integration of disciplines provides well-thought-out feasibility scopes of work and solutions. This also relates to sustainability, LEED, WHOLE Building guidelines, and net-zero solutions that involve the integration of building envelope insulation and fenestration features, mechanical systems, electrical photovoltaic solutions, all connected with technology software for monitoring and benchmarking. For special areas such as photovoltaic systems and net-zero detailing, ATSR partners with several specialist consultants to provide the best value for the client.</p> <p>Our in-house team of interior designers, architects, and engineers quickly analyze products and systems relative to first-cost and long-term maintenance costs over the life of the facility. Our team provides clients with payback calculations, with relevant rebates and grants figured into the formulas. Our highly proficient in-house specifications group has a comprehensive understanding of products, systems, and installations, guiding clients in decision-making.</p> <p>Feasibility, sustainability, and lifecycle assessments are an integral component of ATSR's FCA process and deliverables; they drive decision-making for clients for the best value in designs, products, and systems.</p>
83	Asset, capital, and deferred maintenance planning and asset classification	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>Responses described throughout this proposal show ATSR's strength in asset, capital, and deferred maintenance planning for school district and governmental entities. ATSR's software system, developed and refined over a 30-year timeframe has evolved into a client user-friendly tool to manage assets, capital, and long-term facilities maintenance projects.</p> <p>ATSR has worked with hundreds of clients, conducting FCAs and guiding recommendations for project prioritization, funding source determination, and scope of solutions for best value. Assets are evaluated based on facility useful life, project cost investment, and overall benefit to users.</p> <p>For most of ATSR's FCAs conducted for clients, we continuously update and 'check-off' work orders that have been accomplished, updating inflation estimates for future work, typically over a 10-year duration. ATSR trains clients to use our system and we frequently provide annual analysis and update to FCAs prepared for clients for their work.</p>

84	Benchmarking services and quality assurance	<div><div><input checked="" type="radio"/> Yes</div><div><input type="radio"/> No</div></div>	<p>ATSR implements benchmarking in many forms of activities and tools. For example, at the beginning of an FCA, ATSR develops a Facilities Conditions Index (FCI) with the client, posting current conditions and then benchmarking to show progress, completions, cost saving measures, and improvements made to properties over time.</p> <p>For mechanical systems, ATSR implements benchmarking for HVAC systems, including indoor air quality, air distributions, air supply, and exchange rates. We document status and progress of systems performance in the areas of facility energy use, maintenance, and sustainability.</p> <p>For most FCA's ATSR implements a 5-10-20-year benchmarking analysis, which considers payback periods and realized cost savings over time.</p>
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85	Project management and coordination with facility owners	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR project management and owner coordination is included in all FCA and building design and construction projects. Our architects and engineers are trained to be proactive in leading and guiding clients through the services ATSR is hired to render. Our project managers are well-versed in organizing the scope of work and deliverables for a project, setting and monitoring action items and schedules for a successful project.</p> <p>ATSR's process is highly participatory, involving facility owners and user groups in coordination measures (e.g., receiving data from and listening to client facility operators, conducting progress reviews/status, and collaborating in creating solution options).</p> <p>ATSR 'walks-the-talk' in the facilities items we assess – we actually design and engineer those systems/products in projects we design for new construction and additions and alterations/replacements. We understand what to assess and know the process for effective upgrades, replacements, and retrofits. The process is streamlined with ATSR project management capabilities and ability to coordinate with facility owners. We know that facility owners are frequently the most reliable resource of information for the architect/engineer in evaluating products and systems. Our project managers want to know the expectations of the client regarding product/system performance, price level, and quality, since each client is unique.</p> <p>Our project managers utilize a Critical Path Method (CPM) for FCA work, since numerous topics and evaluation categories are in play with potentially hundreds of facilities. Along with that, our quality assurance protocols are in place to assure compliance and consistency in deliverables (e.g., sample assessments, pilot samples).</p>
86	Contract management and financial monitoring	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR manages contracts and financial monitoring for education and government clients. We prepare owner-architect agreements and supplemental documents, stipulating terms and conditions of performance and deliverables. Typical agreements utilized include numerous American Institute of Architects (AIA) agreement forms, depending on standard format, short-form format, and construction manager (CM) format. For studies or limited scope projects, ATSR utilizes its own document for agreements. Contract modifications are handled through amendments or Work Authorizations (i.e., for projects added on to the main agreement).</p> <p>ATSR manages construction contracts for clients. We prepare the owner-contractor and/or owner-CM</p>

			<p>agreements and supplemental documents, identifying contract award amounts, substantial completion requirements, project milestones and sequencing protocols, change order processes, disputes/resolutions, and payment requirements. All terms are clearly defined and understood, based on the AIA format. Since ATSR prepares the specifications and typically prepares the 'front-end' of the Project Manual, which incorporates all AIA General Conditions and the project Supplemental Conditions, ATSR is well-suited to manage the construction contract. During construction, ATSR manages all change orders, construction meetings, supplemental instructions, requests for change documents, substantial completion forms, payment certificates, and other project documentation.</p> <p>For financial monitoring of professional services, ATSR reviews status of ATSR services costs with the client ongoing, so there are no surprises as the scope of work is carried out. ATSR manages its own consultant costs for the client. Our philosophy is not to push add-on services onto the client during a project. If we see the need for additional services, we discuss options on how the client may benefit from services, but final decisions are from the client.</p> <p>For financial monitoring of design/construction projects, ATSR generates construction cost estimates and project cost estimates during the planning and concept phases, and continues to manage, monitor, and refine costs throughout the project to receiving construction bids. During construction, costs are monitored for deviations. Construction and project costs are updated for compliance to fit within the project budget. ATSR's project estimating includes construction costs, inflation, soft costs (e.g., fees, furniture, technology, permits, agency fees, contingency) for a wholistic view.</p>	
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87	Budget development, and program management services	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR specializes in developing project budgets at the early stages of a study, FCA, and for design and construction projects. Frequently, we are budgeting four years out for multi-million dollar construction projects. For FCA work, ATSR prepares and develops all construction and project cost estimates for immediate construction work and future work projected out 5-10-15 years. For design and construction projects, ATSR estimates construction and project costs, including forecasting construction inflation to bid date. ATSR manages the project budget during construction.</p> <p>ATSR utilizes the Engineering News Record (ENR) cost index and others for forecasting future costs, with keen accuracy. ATSR's database of construction cost history of our projects is robust; we draw from this extensive resource for clients. We also are in constant contact with product vendors and suppliers, keeping our pulse on product costs and inflation, all for the benefit of the client.</p> <p>For program management, ATSR defines this as managing innerworkings of business entities for improving the entity's performance, deliverables, production, etc. While ATSR engages in program management for our own company, we do not provide this type of service to clients.</p>
88	Assessment and planning services complementary to the offering of solutions described in lines 77 to 87 above.	<input checked="" type="radio"/> Yes <input type="radio"/> No	<p>ATSR is a robust planning, architectural, and engineering firm with 80 years of experience in public/private education and government projects. Within the services provided in Questions #77 to #87 above, ATSR also offers:</p> <ul style="list-style-type: none"> <li>- Verification of existing conditions, measured drawings and CAD conversion services</li> <li>- Existing facilities surveys</li> <li>- BIM management</li> <li>- Value analysis</li> <li>- Detailed cost estimates</li> <li>- On-site project representation</li> <li>- As-constructed record drawings</li> <li>- post-occupancy evaluations</li> <li>- Sustainable project services per AIA specific definition</li> <li>- Fast-track design services</li> <li>- Multiple bid packages</li> <li>- Forensics analysis</li> <li>- Initial Decisionmaker services as defined by AIA</li> <li>- Rebates assistance services</li> <li>- Grant writing assistance for special funding</li> <li>- Energy Star certification</li> <li>- Wetland delineation services through our consultant</li> </ul> <p>Our full-service expertise and approach provides direct benefit for clients.</p>

Table 9: Exceptions to Terms, Conditions, or Specifications Form

**Line Item 89. NOTICE:** To identify any exception, or to request any modification, to Sourcewell standard Master Agreement terms, conditions, or specifications, a Proposer must submit the proposed exception(s) or requested modification(s) via redline in the Master Agreement Template provided in the “Bid Documents” section. Proposer must upload the redline in the “Requested Exceptions” upload field. All exceptions and/or proposed modifications are subject to review and approval by Sourcewell and will not automatically be included in the Master Agreement.

Do you have exceptions or modifications to propose?	Acknowledgement *
	<input type="radio"/> Yes <input checked="" type="radio"/> No

Documents

Ensure your submission document(s) conforms to the following:

1. Documents in PDF format are preferred. Documents in Word, Excel, or compatible formats may also be provided.
2. Documents should NOT have a security password, as Sourcewell may not be able to open the file. It is your sole responsibility to ensure that the uploaded document(s) are not either defective, corrupted or blank and that the documents can be opened and viewed by Sourcewell.
3. Sourcewell may reject any response where any document(s) cannot be opened and viewed by Sourcewell.
4. If you need to upload more than one (1) document for a single item, you should combine the documents into one zipped file. If the zipped file contains more than one (1) document, ensure each document is named, in relation to the submission format item responding to. For example, if responding to the Marketing Plan category save the document as “Marketing Plan.”
  - [Pricing](#) - ATSR PRICING per Table #7.pdf - Wednesday October 23, 2024 13:08:46
  - [Financial Strength and Stability](#) - Security Bank and Trust Co\_and\_Wells Fargo Co\_Letter of Good Standing 10-2024.pdf - Wednesday October 23, 2024 11:49:18
  - [Marketing Plan/Samples](#) - Table 5A Question 45 FCI Matrix Summary.pdf - Tuesday October 22, 2024 12:05:53
  - WMBE/MBE/SBE or Related Certificates (optional)
  - [Standard Transaction Document Samples](#) - AIA B101 - 2017 Owner Architect Agreement \_ AIA E203 \_ AIA G201.pdf - Tuesday October 22, 2024 12:13:00
  - Requested Exceptions (optional)
  - [Upload Additional Document](#) - ATSR Planners-Architects-Engineers \_ Future Ready Forward Thinking Spaces - Labs - Maker Spaces - Tinker - Classrooms - Specialty - Agr.pdf - Wednesday October 23, 2024 12:59:04

## Addenda, Terms and Conditions

### PROPOSER AFFIDAVIT OF COMPLIANCE

I certify that I am an authorized representative of Proposer and have authority to submit the foregoing Proposal:

1. The Proposer is submitting this Proposal under its full and complete legal name, and the Proposer legally exists in good standing in the jurisdiction of its residence.
2. The Proposer warrants that the information provided in this Proposal is true, correct, and reliable for purposes of evaluation for award.
3. The Proposer certifies that:
  - (1) The prices in this Proposal have been arrived at independently, without, for the purpose of restricting competition, any consultation, communication, or agreement with any other Proposer or competitor relating to-
    - (i) Those prices;
    - (ii) The intention to submit an offer; or
    - (iii) The methods or factors used to calculate the prices offered.
  - (2) The prices in this Proposal have not been and will not be knowingly disclosed by the Proposer, directly or indirectly, to any other Proposer or competitor before award unless otherwise required by law; and
  - (3) No attempt has been made or will be made by Proposer to induce any other concern to submit or not to submit a Proposal for the purpose of restricting competition.
4. To the best of its knowledge and belief, and except as otherwise disclosed in the Proposal, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest. An organizational conflict of interest is created when a current or prospective supplier is unable to render impartial service to Sourcewell due to the supplier's: a. creation of evaluation criteria during performance of a prior agreement which potentially influences future competitive opportunities to its favor; b. access to nonpublic and material information that may provide for a competitive advantage in a later procurement competition; c. impaired objectivity in providing advice to Sourcewell.
5. Proposer will provide to Sourcewell Participating Entities Solutions in accordance with the terms, conditions, and scope of a resulting master agreement.
6. The Proposer possesses, or will possess all applicable licenses or certifications necessary to deliver Solutions under any resulting master agreement.
7. The Proposer will comply with all applicable provisions of federal, state, and local laws, regulations, rules, and orders.
8. Proposer its employees, agents, and subcontractors are not:
  1. Included on the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>;
  2. Included on the government-wide exclusions lists in the United States System for Award Management found at: <https://sam.gov/SAM/>; or
  3. Presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from programs operated by the State of Minnesota; the United States federal government, as applicable; or any Participating Entity. Vendor certifies and warrants that neither it nor its principals have been convicted of a criminal offense related to the subject matter of this solicitation.

☒ By checking this box I acknowledge that I am bound by the terms of the Proposer's Affidavit, have the legal authority to submit this Proposal on behalf of the Proposer, and that this electronic acknowledgment has the same legal effect, validity, and enforceability as if I had hand signed the Proposal. This signature will not be denied such legal effect, validity, or enforceability solely because an electronic signature or electronic record was used in its formation. - David Maroney, President, Armstrong, Torseth, Skold & Rydeen, Inc. (ATSR)

The Proposer declares that there is an actual or potential Conflict of Interest relating to the preparation of its submission, and/or the Proposer foresees an actual or potential Conflict of Interest in performing the obligations contemplated in the solicitation proposal.

☒ Yes    ☐ No

The Bidder acknowledges and agrees that the addendum/addenda below form part of the Bid Document.

Check the box in the column "I have reviewed this addendum" below to acknowledge each of the addenda.

File Name	I have reviewed the below addendum and attachments (if applicable)	Pages
Addendum_8_RFP_102424_Facility_Assessment Wed October 16 2024 04:32 PM	<input checked="" type="checkbox"/>	2
Addendum_7_RFP_102424_Facility_Assessment_&_Planning Fri October 11 2024 02:15 PM	<input checked="" type="checkbox"/>	1
Addendum_6_RFP_102424_Facility_Assessment Fri October 4 2024 02:43 PM	<input checked="" type="checkbox"/>	1
Addendum_5_RFP_102424_Facility_Assessment Wed October 2 2024 01:31 PM	<input checked="" type="checkbox"/>	1
Addendum_4_RFP_102424_Facility_Assessment Tue October 1 2024 10:09 AM	<input checked="" type="checkbox"/>	1
Addendum_3_RFP_102424_Facility_Assessment Fri September 27 2024 08:36 AM	<input checked="" type="checkbox"/>	1
Addendum_2_RFP_102424_Facility_Assessment Tue September 17 2024 08:47 PM	<input checked="" type="checkbox"/>	1
Addendum_1_RFP_102424_Facility_Assessment Wed September 11 2024 02:41 PM	<input checked="" type="checkbox"/>	1