



**Wisconsin Center  
District  
Security Services  
Contract  
6/11/2019**

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# WISCONSIN CENTER DISTRICT

## SECURITY SERVICES CONTRACT

THIS CONTRACT (the "Agreement") is made as of the \_\_\_ day of June, 2019 between The Wisconsin Center District, a Wisconsin special district created pursuant to Chapter 229 of the Wisconsin Statutes ("District") and Per Mar Security and Research Corp., an Iowa corporation ("The Vendor"), doing business as Per Mar Security Services. The District and The Vendor hereby agree as follows:

### 1. Contract Terms

The following terms have the meanings set forth below in this Contract and General Conditions:

#### "District":

Name: Wisconsin Center District  
Address: 400 West Wisconsin Ave.  
Milwaukee, WI 53203  
Telephone No.: (414) 908-6000  
Facsimile No.: (414) 908-6010  
Representatives: Martin Brooks –President / CEO (Legal Notices)  
Steve Marsh – VP of Finance (Accounting issues)  
Jeremie Ott – Director of Public Safety and Guest  
Services (Security, labor and other)

#### "Vendor"

Name: Per Mar Security Services  
Address: 2323 S. 109<sup>th</sup> Street  
Suite 175  
West Allis, WI 53227  
Telephone No.: 414-483-2239  
Facsimile No.: 414-744-9949  
Representatives: Mark Schaefer: General Manager  
cell: 414-345-7027  
mark.schaefer@permarsecurity.com  
(Labor Issues and Scheduling)  
  
Ronda Meyer  
VP/Controller  
rmeyer@permarsecurity.com  
(800) 473-7627  
1910 East Kimberly Road

Davenport, Iowa 52817  
(Legal Notices, Accounting Issues, and Contract related items)  
Nick Szablewsik: Asst. Operations Manager  
Events  
cell: 414-698-5022  
nszablewsik@permarsecurity.com

Colin Vick: Director of Business Development  
cvick@permarsecurity.com  
Toll Free Direct Office: 844-210-5251;

Certifications: None

## **“Intended Subcontracted Labor”:**

### **Security Labor**

No Intended Subcontracted security labor identified.

### **Preventative Maintenance –hand held metal detection wands & metal detection Magnetometers**

Name: Event Metal Detectors LLC  
Security Detection, Central Division  
Address: 6626 Monroe Street  
Sylvania, OH 43560  
Telephone No.: 888-886-2318  
Email: jbrightly@securitydetection.com;  
info@eventmetaldetectors.com  
Fax: 419-885-7099  
Representative: Justin Brighty  
Certifications: None

## **2. Contract Documents**

The Contract consists of this Agreement and the following exhibits attached hereto:

- RFP Security Services.pdf (“RFP”)
- RFP Exhibit B.Floorplans.pdf
- Proposal Per Mar Security.pdf dated March 27, 2019 (“Proposal”)
- Per Mar – Account Manager Job Description.pdf
- Per Mar – Metal Detection Preventative Maintenance.pdf

The Contract represents the entire and integrated agreement between the parties hereto and supersedes prior negotiations, representations or agreements, either written or oral.

### **3. The Term and Scope of Work**

By executing this Agreement, subject to Section 10 below, the Wisconsin Center District (the "District") is entering into a three (3) year and two (2) month Contract, beginning (a) on June 30, 2019 at 11:00 PM (with regard to the provision of Security Patrol Officers to provide 24-hour Security Services), and (b) on August 1, 2019 at 12:01 AM with regard to the provision of per-event Security Services), and terminating on August 31, 2022 at 11:59 PM, for the provision of Security Services, including event specific Security Services and 24-hour, non-event specific Security Services, as more particularly described herein and in the RFP and in the Proposal submitted by the Vendor and approved by the District. The District shall have the option to renew the Contract for an additional two (2) years by delivering written notice of such renewal to Vendor at any time prior to the expiration of the initial three-year and two-month term. The Vendor will provide staffing on an as-needed long and short term basis for events held at District facilities in the form of qualified, full- and part-time, currently licensed (if and as required by Wisconsin state statute) persons, for positions identified as Event Security Officer, Event Security Supervisor, Security Patrol Officer, and Event Lead, each as further described in Exhibit A attached hereto, and will also coordinate preventative maintenance for the metal detection hand held wands and metal detection magnetometers, all as more particularly described in the RFP and in the Proposal submitted by the Vendor and approved by the District. Vendor will recruit, hire, schedule, train, supervise and discipline employees sufficient to meet the standard set forth in the previous sentence. Scheduling for the services of Vendor for per-event positions related to events at District facilities is solely at the discretion of the District. Vendor will attend planning meetings in connection with the District's proposed staffing levels, posts and hours; provided, that final decisions related to staffing levels, posts and hours shall be determined by the District in the District's discretion. Vendor will develop staffing plans in accordance with the security and event-related needs as determined by the District, and will provide cost estimates for events as requested by the District.

Though Vendor shall be the primary supplier of all services required under this Contract, Vendor shall have the right, upon receipt of written approval from the District, and subject in all cases to the terms of this Contract, to engage other qualified security companies on a per-event basis to supply personnel if the labor supply available to Vendor is insufficient to meet the demands of a given event. In addition, throughout the Term, all third parties to which the District grants a license to use any portion of the District's facilities ("Licensees") shall have the right to contract with security providers other than Vendor, in the sole discretion of such Licensees. Vendor shall have no right to perform or receive payment for any services performed by a third party security provider on behalf of any Licensee, and Vendor shall cooperate with such Licensees and their third party security providers, and with the District, to ensure that the Security Services are provided in an effective and efficient manner consistent with the requirements of this Contract.

### **4. The District's Expectations of the Vendor**

As stated in this Contract, and to summarize, the Vendor shall provide trained and qualified staffing for the District. Staff shall meet personnel standards set forth by the District, including but not limited to the requirements set forth in Exhibit A attached hereto, background checks, be equipped with the proper uniform and arrive for their shift on time. Vendor shall further provide

the services required hereunder in conformity with current practices in the security and event staffing industry, shall endeavor to provide service of the highest quality attainable, and shall in any event meet the service and personnel standards set forth in Exhibit B attached hereto.

## **5. Time of the Essence – Staff Implementation & Damages**

The failure to conclude implementation and adjustment within the time periods set forth herein and specified by the District will cause the District substantial loss of revenue and reputation. Therefore, if the Vendor is unable to begin providing Security Patrol Officers to provide 24-hour Security Services as of June 30, 2019 at 11:00 PM, in accordance with the terms of the Contract, the Vendor shall bear, as liquidated damages, a cost of \$2,000.00 for each day the Vendor fails to provide such Security Services or otherwise fails to adhere to the terms of the Contract. Likewise, if the Vendor is unable to begin providing all Security Services as of 12:01 AM on August 1, 2019, including 24-hour services and per-event services, in accordance with the terms of the Contract, the Vendor shall bear, as liquidated damages, a cost of \$5,000.00 for each day the Vendor fails to provide such Security Services or otherwise fails to adhere to the terms of the Contract. The Vendor will not be responsible for liquidated damages caused by delays from the District. The liquidated damages amount may be offset against amounts payable to the Vendor as the District deems appropriate.

For any event for which the Vendor fails to provide eighty one percent (81%) or more of the event staff required of Vendor under the Contract, the Vendor shall reduce the bill for the event by five percent (5%) of the bill that otherwise would have been due pursuant to the payment schedule set forth in Section 7 below.

## **6. Terms and Conditions**

The Vendor enters into this Agreement based upon the acceptance of terms and conditions set forth within this document. This Agreement, the RFP, the Vendor Proposal, and all attachments thereto comprise the Contract as set forth above, provided that in the event of a conflict between the terms of this Agreement and the terms of any other element of the Contract, the terms of this Agreement shall prevail.

## **7. Payment Terms**

The Wisconsin Center District agrees to Net 30 day payment terms. The District will not pay overtime unless approved in advance by the Director of Public Safety & Guest Services or his/her designee. Invoice reconciliation must occur within (3) three-months of invoice date. Invoices submitted for payment beyond (6) six-month period shall not be honored. The Vendor shall not impose payment penalties of any kind including, but not limited to late fees, service charges, cancellation fees, interest or placing the District on credit hold.

With each application for payment, the Vendor shall provide to the District:

- (a) Breakdown of labor for individual events. Sign in & sign out sheets for the corresponding invoice.

- (b) An application for payment towards the end of an event which is being settled with the promotor that night.
- (c) Unless otherwise requested by the District, event invoices shall be submitted within 48 hours of conclusion of an event.
- (d) Subcontracted work shall be noted on the application for payment. All payments issued by the District will be made only to the Vendor. Exception: The District will provide payment directly to the preventative maintenance company provided that the Vendor provides the proper approvals that work has been completed.

The District may withhold a payment in whole or in part, to the extent reasonably necessary to protect the District or to the extent the District disputes in good faith the amount of such payment. If the Vendor and the District cannot agree on the amount of the payment, the District will promptly issue payment for the amount which is undisputed, if any. Additionally, and notwithstanding any other term or condition of this Contract or any of the Vendor Documents, the District may also withhold payment or, because of subsequently discovered evidence, may nullify the whole or a part of a payment previously issued, to such extent as may be necessary in the District's reasonable opinion to protect the District from loss to the extent the Vendor is determined to be responsible, including loss resulting from negligent acts and omissions because of:

- (a) Failure of Vendor to provide the full Scope of Work required hereunder;
- (b) third party claims filed or reasonable evidence indicating probable filing of such claims unless security acceptable to the District is provided by the Vendor;
- (c) failure of the Vendor to make payments properly to Subcontractors;
- (d) damage to the District or a separate vendor;
- (e) failure to carry out the Work in accordance with the Contract; or
- (f) the existence of any default under the Contract.

If the District withholds payment from the Vendor, then the District, prior to the time that payments are due, shall notify the Vendor in writing of the District's reasons for the withholding. When all of the reasons for withholding payment are removed and/or cured, the District shall make payment for such amounts previously withheld in accordance with this Section.

The District shall make payments to the Vendor in accordance with the following schedule:

Standard District Rate	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
	June 30, 2019 - August 31, 2020	September 1, 2020 – August 31, 2021	September 1, 2021 – August 31, 2022	September 1, 2022 – August 31, 2023	September 1, 2023 – August 31, 2024
Event Security Standard Hourly Labor Rate	\$15.71	\$16.02	\$16.34	\$16.67	\$17.00
Event Lead Standard Hourly Labor Rate	\$17.17	\$17.48	\$17.83	\$18.18	\$18.54
Event Security Supervisor Labor Rate	\$18.57	\$18.94	\$19.32	\$19.71	\$20.10
Security Patrol Officer Labor Rate	\$18.57	\$18.94	\$19.32	\$19.71	\$20.10
Account Manager Standard Hourly Rate	\$31.43	\$32.06	\$32.70	\$33.34	\$34.02

Labor Rate	Labor Rate Description (ie hours / Days)
Standard	The standard rate will apply for all days and hours of the normal schedule.
OT	Per Mar use of 1.47 times the standard rate for hours outside the normal schedule where OT is incurred.
Double Time	No Double Time Rate
Other	N/A
Holiday Pay	Holiday billing rate will be 1.47 times the standard rate for the six noted holidays below.
	Holiday rate applicable for the position of Security Patrol Officer. Holiday rate is applicable for all other positions only by request of the District.

WCD will honor the following Holiday's for Holiday Pay. A list to identify the actual date will be provided to the Vendor upon the start of each year of the contract.

New Year's Day	Memorial Day	Independence Day	Labor Day
Thanksgiving Day	Christmas Day		

**PM Program for Metal Detection hand held wands and Magnetometers**

Service Provider Name / Contact Phone number	Security Detection Justin Brighty Security Director 888-886-2318 jbrighty@securitydetection.com				
	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
Annual Fees	\$5000	\$5000	\$5000	\$5000	\$5000
PM program proposed by the Service Provider is included in the attachments.					

The cost and pricing terms set forth in this Section 7 are guaranteed and shall not be altered, except with the written agreement of the District and Vendor, subject to (a) increases to the federal, state, or local minimum wage, (b) increases in legally required employer contributions or payments, or (c) any other statutorily required increases.

**8. Taxes**

The District is a tax exempt facility. The Vendor will provide the District with sales and use tax savings associated with Vendor and all Subcontractor work in the form of lower bids on its Project for the District's benefit. The District will provide the Vendor with the W-9 Form and WI Sales and Use Tax Exempt Form.

**9. Insurance Certificate**

The Vendor and any subcontractors engaged by the Vendor shall, before performing any work for the District pursuant to this Contract, submit an Insurance Certificate to the District's Purchasing Manager and, upon request from the District, a copy of the full insurance policy to which such Insurance Certificate relates, evidencing that Vendor or such subcontractor (as the case may be) carries insurance in the amount and with coverages set forth below. The District and its designees shall be named additional insureds on all liability policies, which shall conform with the requirements set forth in the Contract, and be in the amounts and coverages set forth below:

Worker's compensation insurance (statutory limits). Coverage shall be in compliance with the statutes of the state where the services are performed.

Commercial and Professional General Liability Coverage including but not limited to all coverage's standard to the most recent Insurance Services Office (ISO) form (not less than \$5,000,000 per claim and in the aggregate).

Minimum coverage: General Liability at \$1 million, General Aggregate at \$2 million, and Umbrella Liability at \$5 million.

## **10. Termination, Suspension and Delay**

The District may, at any time and for any reason, terminate this Contract for the District's convenience upon (30) thirty days written notice to Vendor. In the event the District terminates for convenience, the Vendor shall be entitled to receive payment for Work property executed, and actual costs incurred by reason of such termination, provided that under no circumstances shall the Vendor be entitled to anticipated or lost profits.

The District may further terminate this Contract for cause if the Vendor: (1) breaches the term of this Contract, including but not limited to by failing to supply the necessary Event Security, Event Security Supervisor, Security Patrol Officer, or other personnel or the failure of such personnel to meet the minimum standards set forth in this Contract; (2) fails to make payments to any Subcontractors; (3) disregards applicable laws, statutes, ordinances, codes, rules and/or regulations, including but not limited to with regard to payment of withholding taxes; (4) intentionally deleted; (5) fails to provide regular unannounced site inspections of the District's public safety personnel for the purpose of assisting the District in the delivery of quality service to its clients; (6) fails to adequately train its employees in basic security functions, fails to fully investigate the background of employees before assignment to the District, or inadequately supervises its employees assigned to the District; (7) failure to suspend or transfer employees working at the District that are found to be in violation of the District's rules, policies, or procedures; (8) failure to fully investigate any alleged impropriety involving employees working at the District that, if true, would reasonably be expected to adversely affect the District or the District's operation of its facilities; (9) fails to work with MBE's or WBE's in accordance with the requirements of this Contract (see Section 14); or (10) becomes bankrupt, insolvent, or makes a general assignment for the benefits of its creditors. The District shall give the Vendor thirty (30) days' written notice of the District's intent to terminate this Contract under this paragraph. The Vendor shall have an opportunity to fully cure the breach giving rise to the termination within the thirty (30) day period. In the event this Contract is terminated under this paragraph, the Vendor shall be entitled to payment and receive payment for Work property executed only. Under no circumstances shall the Vendor be entitled to anticipated or lost profits.

## **11. Dispute Resolution**

In the event that the parties encounter a dispute arising under this Contract, the parties shall attempt to first resolve the dispute through informal dispute resolution. Upon a party's determination that

a dispute exists related to this Contract, that party shall submit written notice to the other party describing the dispute ("Dispute Notice"). Within ten (10) business days after receipt of the Dispute Notice, the parties shall meet at a mutually agreed-upon location to discuss possible resolution of the dispute.

In the event the parties are unable to agree upon a resolution of the dispute at the meeting, the parties shall endeavor to resolve the dispute through non-binding mediation before turning to litigation. Unless the parties mutually agree otherwise, mediation shall be administered by a qualified mediator chosen by the District, in the District's reasonable discretion. A request for mediation shall be made in writing, delivered to the other party to this Contract, and filed with the person or entity administering the mediation.

All costs and expenses pertaining to the costs of non-binding mediation shall be equally divided between the parties. Each party shall pay their own costs and attorney fees. Neither party shall be excused from continued performance of its obligations under this Contract while mediation under this section is pending, so long as payment obligations remain current.

Any dispute arising under this Contract not resolved through mediation as set forth above shall be resolved through litigation. The forum and venue of any litigation arising from the Contract shall be a state court of competent jurisdiction in the State of Wisconsin and in no other forum, and shall apply Wisconsin law. In the event a lawsuit is brought to enforce the terms or conditions of this Contract, the prevailing party shall be entitled to the payment of all costs and fees incurred in bringing or defending against the lawsuit from the non-prevailing party including, but not limited to, reasonable attorneys' fees, court costs, investigation costs and all related expenses.

## **12. Indemnification**

Vendor shall defend, indemnify and hold harmless the District and its employees, agents, contractors, and affiliates from and against all claims, damages, losses, and expenses, including attorneys' fees and costs, in any way arising out of resulting from the acts, errors, and omissions, conduct or operations of Vendor, its employees, agents or subcontractors pursuant to the Contract.

## **13. Affirmative Action**

The Vendor shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, ancestry, sexual orientation, gender identity or expression, familial status, legal source of income, veteran status, or disability unrelated to job requirements. The Vendor shall take affirmative action to ensure that applicants are employed, and employees are treated during employment, without regard to the above characteristics, including without limitation with regard to following: advertising for positions, layoff or termination, rates of pay, other forms of compensation, selection for training and conditions of employment. The Vendor agrees to post in conspicuous places which are available to employees and applicants for employment all non-discrimination notices which are required by law and/or provided by the District.

The Vendor agrees, in all solicitations or advertisements for employees placed by or on behalf of the Vendor, to state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, ancestry, sexual orientation, gender identity or expression, familial status, legal source of income, veteran status, or disability unrelated to job requirements.

The Vendor shall comply with the District's Affirmative Action Program to assure non-discrimination and fair employment practices.

#### **14. MBE / WBE Participation**

It is the goal of the District to promote MBE/WBE (as defined in the RFP) participation in this and all other contracts. The Vendor agrees to provide the District with MBE and WBE participation rates pursuant to the requirements of the RFP.

#### **15. Extension of Contract**

Upon the expiration of this Contract, and upon the request of the District, Vendor agrees to provide up to an additional ninety (90) days of services upon the same terms and conditions set forth in this Contract in order to provide any necessary transition services to the District or to any successor to Vendor.

#### **16. Miscellaneous**

The Vendor, in performing the Work, shall be deemed to be an independent Vendor and not an agent or employee of the District. The Parties further agree that the District is not directing or requiring Vendor to meet or comply with any mandatory or permissive subject of bargaining under state or federal labor law.

The Vendor shall not assign this Contract in whole or in part without the prior written consent of the District. Any assignment not made in accordance with this section shall be void. This Contract shall inure to the benefit of and be binding upon the successors and permitted assigns of the parties.

The various terms, provisions and covenants of this Contract shall be deemed to be separable and severable, and the invalidity or unenforceability of any of them, as determined by a court of competent jurisdiction, shall in no manner affect or impair the validity or enforceability of the remainder of this Contract and the invalid or unenforceable term, provision or covenant shall be deemed severed from this Contract.

No notice to Vendor to quit possession at the expiration date of the term of this Contract shall be necessary. Vendor agrees that at the expiration date of the term of this Contract, or at the earlier termination thereof, it will peaceably surrender possession of and vacate all District facilities, leaving same in good condition, reasonable wear and tear and acts of God excepted. Upon expiration or

earlier termination of this Contract, the District shall have the right to take possession of all its facilities, without being liable for prosecution of any claim or damages related thereto.

Vendor shall, at all times, comply with all applicable laws, rules, regulations, ordinances, and orders of the Federal Government, State of Wisconsin, City or Milwaukee, and any other governmental entity with jurisdiction over the District's facilities, Vendor, or the District, including but not limited to laws promulgated by OSHA and any minimum wage laws. Vendor shall also abide by all rules and regulations of the District. Vendor shall, at its sole cost and expense, obtain and keep in force all necessary licenses, permits, etc. as required by the above mentioned governmental entities in order to provide the services required under this Contract. All such permits, licenses, etc., shall be available for review by the District at all times upon oral or written request by the District.

The District reserves the right to use additional contractors to supply the services described in this Contract if the District determines, in its reasonable discretion, that such additional contractors are necessary to meet the demand for services in connection with a particular event or events; provided, that except with regard to the Convention (as hereinafter defined) it is the intention of the District, in all cases, to use Vendor as the primary source for the provision of security services for the District. In addition, and notwithstanding any provision of this Contract to the contrary, Vendor and District acknowledge that due to the unique security requirements of the Democratic National Convention (the "Convention"), portions of which will take place in and around the District's facilities in July, 2020, the District shall have the absolute right to engage and work with third parties, including but not limited to the United States Secret Service and other third party security providers, for the provision of security services in connection with the Convention. The District shall further have the right, but not the obligation, to suspend this Contract by written notice to Vendor during the Convention and at such other times as may be deemed necessary by the District in preparation for the Convention.

Vendor shall engage in reasonable efforts to employ persons residing in Milwaukee County for the provision of the Security Services at the District's facilities. Vendor agrees, as a goal, that at least fifty percent (50%) of the persons hired by Vendor to provide the Security Services at the District's facilities shall reside in Milwaukee County, provided that so long as Vendor uses reasonable efforts to achieve such goal, Vendor's failure to achieve such goal shall not be a breach of this Contract. Vendor shall, from time to time, upon written request by the District, deliver to the District a written report setting forth (a) the percentage of persons employed by Vendor for the provision of the Security Services at the District's facilities that are Milwaukee County residents, and (b) the efforts taken by Vendor to achieve the goal that at least fifty percent (50%) of the persons hired by Vendor to provide the Security Services at the District's facilities reside in Milwaukee County.

This Contract, any amendments or change orders may be executed in one or more counterparts, all of which together shall constitute one and the same fully executed instrument, and may also be executed by electronic or fax signature which shall be deemed an original signature for all purposes.

This Contract has been drafted, negotiated, and entered into by each party with each having the opportunity to seek the advice of independent counsel. Accordingly, this Contract shall not be construed against one party or the other based on which party drafted any portion of this Contract.

(Signatures appear on the following page)

**17. SIGNATURES - WISCONSIN CENTER DISTRICT  
Security Services**

Wisconsin Center District

---

By: Martin Brooks, President/CEO

Date

Per Mar Security and Research Corporation

---

By: Ronda Meyer, Vice President/Controller

Date

**Exhibit A**  
**Description of Positions to be Staffed**

**EVENT SECURITY OFFICER (ESO) (Licensed where required by state statute):**

This position is used in the greatest number and requires individuals to stand a post in locations such as exhibit hall over-head doors, dock areas, interior doors and similar locations during show move in/out. During move in/out and even some shows officers may be required to assist with traffic congestion around the District complex. They may also be required to be at fixed posts in individual exhibit booths, roving posts to guard merchandise, and as required during show hours to assist the public in attending the event. ESOs enforce building regulations and specific security plans designed for each show. Most of the work area is indoors but there are occasions when ESOs will be exposed to winter weather directly while working in unheated exhibit halls during move in/out. ESO shall further perform screening of event attendees using hand held wands and magnetometers

**EVENT SECURITY SUPERVISOR (ESS) (Licensed where required by state statute):**

Vendor shall provide a full time ESS to recruit, hire, schedule, direct and supervise Vendor's personnel. The ESS will ensure all ESOs are fully informed and trained for the function they are performing on any post. The position reports to District Public Safety Managers and Supervisors. This person will participate in ESO training specific to the District and event- and show-related activity as directed. This individual will ultimately bear the responsibility of being the In-House liaison between the Vendor and the District.

**SECURITY PATROL OFFICER (SPO) (Licensed):**

Vendor shall, upon request from the District, provide SPO's to staff several full time positions in the District's facilities. SPO's perform various security functions not always connected to show operations. They work under the direction of the District's Security Manager performing functions related to responding to medical emergencies, investigating building alarms, controlling access to the building and the various meeting rooms, conducting foot patrols around the exterior of the Center complex, and preparing reports describing criminal and non-criminal activities. These positions require good physical conditioning and the ability to operate electric carts and/or segways. The District shall have the right, if it so chooses, to employ its own SPO's in lieu of Vendor providing such SPO's.

**EVENT LEAD (EL) (When required by District) (Licensed where required by state statute):**

Vendor shall, upon request from the District, provide an EL to oversee ESO's and SPO's at a given event, and to serve as the primary point of contact for such event between the Vendor and the District.

**ACCOUNT MANAGER (AM) (Licensed):**

Vendor shall provide a dedicated manager to provide supervision to all positions noted above. Please see Contract Document "Per Mar – Account Manager Job Description.pdf" for more information on purpose and duties of this position.

All personnel provided by Vendor shall be in generally good health and shall meet the following basic physical standards:

- A. Capable of hearing ordinary conversation at a distance of 15 feet with or without the benefit of a hearing aid.
- B. Possess the ability to discriminate between standard colors.
- C. Correctable binocular vision of at least 20/30 (Snellen).
- D. Able to engage in moderate to strenuous physical exertion which includes, without limitation:
  - 1) Lifting and carrying objects weighing-up to forty pounds for a short distance
  - 2) Climbing ladders or stairs without discomfort.
  - 3) Running for up to one hundred feet.
  - 4) Standing or walking for an eight hour shift.
  - 5) Possessing the ability to reasonably defend their person or others from a physical attack without the benefit of any defensive devices.
  - 6) Possessing the ability to speak in a loud voice for the purpose of giving instructions to a crowd.

**Exhibit B**

**Minimum Quality of Service and Personnel Standards**

Vendor shall conduct all work in a professional manner and in accordance with all Federal, State, and City laws, ordinances, rules and regulations, and all employees of Vendor shall abide by the District's rules, regulations, policies and restrictions.

Event Security Officers (ESOs) at all levels must possess a current security license, where previously noted as applicable, at all times while performing duties at District facilities. ESOs reporting to work with expired security licenses will not be permitted to work.

Vendor shall fully investigate the background of all personnel before they are supplied to the District. Personnel shall be free of illegal drug use of any description, and in general have a good work reputation. All personnel provided under this Contract shall be screened for felony criminal convictions, and if an individual has a felony conviction, Vendor shall consider the following prior to supplying the individual to perform services under this Contract: (1) nature of the crime, (2) the time elapsed since the conviction, and (3) the nature of the position to be filled. The applicant shall be given the opportunity to respond to any potentially disqualifying information. Any expense necessary to investigate the background of personnel shall be borne by Vendor, and the background screening process used by Vendor shall comply with all applicable laws, including without limitation the Fair Credit Reporting Act. Vendor agrees to defend and indemnify the District for any liability that may arise in connection with such investigation or the failure to conduct or to adequately conduct such investigation.

Vendor's employees may be required from time to time to operate electric carts, elevators/escalators, electrical overhead doors and other equipment located within the District facilities. Careless operation of this equipment could result in the employee's immediate removal from the facility.

Any and all damage to the District's facilities caused by operation of equipment by the Vendor's employees shall be subject to review by the Director of Public Safety. Vendor agrees that it may be required to reimburse the District for any and all damage to District facilities caused by any employee of Vendor, and in that event, agrees to promptly pay the District's invoice for such damage.

All employees of Vendor shall wear name badges for the purpose of identification at all times while in District facilities. Vendor shall maintain accurate records of the names and addresses of those to whom such badges are issued and shall permit inspection and copying of such records by the District upon request.

All employees of Vendor working in the District's facilities shall be CPR/AED Certified.

All employees of Vendor, while present in District facilities, shall be un-armed. All employees of Vendor shall present a clean, well-groomed, professional appearance. Vendor shall comply with the following mandatory uniform standards for ESOs: white long sleeve shirt (short sleeve permitted during summer months), black tie, black belt, black pants, black sox, and black shoes (no white markings or soles permitted on any portion of shoe). Name badges must be worn, current security licenses must be displayed, company insignia/badge may be worn on shirt. All employees of Vendor shall conduct themselves in a polite, professional manner when relating to building personnel and any other persons in District facilities. The District reserves the right to specify mandatory uniform, grooming and appearance standards for Vendor's staff. The District reserves the right to remove, or have removed, any employee of the Vendor who does not, in the opinion of the Director of Public Safety or his designee, meet the standards of this paragraph.

# **Wisconsin Center District**

**Request for Proposals ("RFP")**

**TO PROVIDE**

**Security Services**

Proposal Due Date:

**Wednesday, March 27, 2019**

**by 12:01 pm CST**

Wisconsin Center District  
400 W. Wisconsin Avenue  
Milwaukee, WI 53203

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## 1.0 GUIDELINES FOR PROPOSALS

### 1.1 Introduction

A special purpose district, the Wisconsin Center District (the "District"), has been established under 1993 Wisconsin Act 263 for the purpose of developing, owning and operating the Wisconsin Center District, consisting of an approximately 700,000 gross square feet exposition center and other related facilities (the "Center"). The Center is located in downtown Milwaukee, Wisconsin bounded by Vel R. Phillips Avenue, North Sixth Street, Wisconsin Avenue and State Street (the "Site").

The District currently owns and operates three multi-purpose sports and entertainment buildings: a convention center with 190,000 gross square feet of exhibit space, 37,000 square foot ballroom, meeting rooms and a 4,100 seat Broadway style theatre, and an 11,000 seat arena, and associated parking areas and related improvements, all as generally depicted in Exhibit B attached hereto (the "facility" or "facilities").

The District seeks an organization to provide the personnel to ensure its facilities and guests are provided an environment which reflects entertainment, convention center and sporting events best practices for facility and event activity.

### 1.2 General Discussion and Outline Scope of

The District is soliciting Proposals for an exclusive security provider for the facilities. Security shall provide all levels of security staff for all events within the District's three facilities. Security functions will include, but are not limited to entrance screening security, crowd control, access control and general event security. The scope of this bid will also include 24 hour unarmed Security Patrol Services to serve the District's needs. Proposals shall reflect, in work plan outline format, considerable thought with regard to providing security services (the "Security Services") to the District.

The Provider shall work cooperatively with the District, the District's assigned Director of Security and Guest Services to coordinate the implementation of the Security Services for the District. The scope of the Security Services is further described in Section 2.0 of this RFP.

#### 1.2.1 The District is seeking at a minimum:

- a. Complete price, delivery and implementation of Security Services.
- b. Routine written communications informing the District of ongoing activities/concerns relating to the provision of the Security Services.
- c. Other services, as necessary, to insure successful implementation, management and training of security personnel.

#### 1.2.2 Project Schedule and Coordination of Efforts

The scheduling and implementation process will commence upon awarding of the contract, notification by the District, and will continue through the team of the District. It is anticipated that the coordination of the schedules, staffing levels, training and services will all be in place to begin full implementation of the Security Services on 1 September 2019.

#### 1.2.3 Definitions

- a. "District" or "Owner" or "WCD" shall mean Wisconsin Center District
- b. "Proposer" or "Bidder" or "Firms" or "Vendor" shall mean each company that has received the RFP and will be bidding on the project.

- c "Contractor" or "Provider" shall mean the company that has been selected to provide products or services or both to the Owner.

### 1.3 Schedule for the Selection of Services

Subject to the parameters in 1.2.2 above, the following is a summary of the contemplated process for the Provider selection. Questions about the RFP materials "Pre-Proposal" is recommended but not required for those firms submitting a response. A written reiteration of the questions asked, and the District's responses thereto, will be supplied via addendum to all firms requesting REP materials and will be considered a part of this RFP. All questions pertaining to this RFP shall be sent via email to Karen Hopp – khoppp@wcd.org, Jeremie Ott - jott@wcd.org, Marty Brooks – mbrooks@wcd.org, Steve Marsh – smارش@wcd.org, and Tom Nicholson – tnicholson@wcd.org.

Firms submitting timely, responsive and responsible proposals in response to the RFP will have their Proposals reviewed by a panel consisting of individuals who will be involved in the District evaluation and/or who have expertise relating to services of this type (the "Evaluation Panel"). This Evaluation Panel will make an analysis and select a short list of finalist Proposers (the "Short List") which will be requested to participate in oral interviews with the District's Committee to present key managerial personnel and to provide additional clarifications of their Proposals (the "Oral Interviews"). Based on the Proposals and Oral Interviews, the Evaluation Committee will make a final analysis and recommendation to the District as to the proposed Provider. The Evaluation Committee's recommendation will be provided to their Board of Directors for approval on May 10, 2019.

The District will select the Provider and will enter into a contract with the selected Provider (the "Contract") in a form substantially in conformance with the form attached hereto as Exhibit C, subject to Section 3.14 hereof, and as otherwise acceptable to the District. The selection process for the Provider is set forth in greater detail in Sections 1.4 through 1.6 of this RFP. Subject to change as described in this Section 1.3, the District has established the following schedule for selection of the Provider:

Description	Central Standard Time	Day	Date - Month - Year
RFP Security Services Released		Thursday	21 February 2019
<b>Mandatory Meeting - Site Visit</b>	<b>9 am – 11 am</b>	<b>Monday</b>	<b>4 March 2019</b>
Deadline to submit any written questions		Wednesday	13 March 2019
WCD respond to written questions		Thursday	14 March 2019
WCD release of Addenda		Thursday	14 March 2019
Intent to Bid Form Due		Friday	15 March 2019
<b>Submission of Proposals</b>	<b>By 12:01 pm</b>	<b>Wednesday</b>	<b>27 March 2019</b>
WCD Review I Proposals / Questions released to bidders	9:30 am – 10:30 am Small North	Monday	1 April 2019

Bidder -- answers back to WCD	By 12:01 pm	Tuesday	2 April 2019
WCD Review II Proposals / Questions released to Bidders	1:30 pm – 2:30 pm Small North	Tuesday	2 April 2019
Bidder -- answers back to WCD	By 12:01 pm	Wednesday	3 April 2019
WCD Review III Proposals / Release Short List / Develop Questions to Short List Companies / schedule interviews	1:30 pm – 2 pm Small North	Wednesday	3 April 2019
WCD Interviews Session 1 (If Necessary)	10 am – Noon Small North	Thursday	4 April 2019
WCD Interview Session 2 (If Necessary)	1:30 pm – 3 pm Small North	Friday	5 April 2019
WCD Interview Session 3 (If Necessary)	1:30 pm – 3 pm Small North	Tuesday	9 April 2019
WCD Review IV	11 am – Noon	Friday	12 April 2019
WCD to Issue the “Intent to Award” letter to all Bidders		Monday	15 April 2019
Finalize Contract		Friday	3 May 2019
Board Final Approval		Friday	10 May 2019
Award Contract		Monday	13 May 2019
Contract Start Date		Sunday	1 September 2019

Written proposals in response to this RFP (the "Proposals") must be received no later than 12:01 p.m., CST, 27 March 2019 at the following address:

Wisconsin Center District  
555 W. Wells Street  
Milwaukee, WI 53203  
Attention: Karen Hopp, Special Projects Manager  
Telephone: (414) 908-6073  
Facsimile: (414) 908-6010

Mandatory Site Visit to be held on Wednesday, March 4th, 2019; 9 am – 11 am at the Wisconsin Center. Park in our Main lot located on Wells Street between 4<sup>th</sup> Street and 6<sup>th</sup> Street. Bring your parking ticket to the meeting for validation. Use the Wisconsin Center building entrance located at 555 W Wells Street. Go up the stairs to the Administrative office, our receptionist will validate your parking ticket. The purpose of the site visit is to assure bidders and Wisconsin Center District that all requirements of the services are fully understood.

The Oral Interviews will be held at the District's Board Room in the Wisconsin Center. Entrance will be the Administration Office Entrance at: 555 W. Wells Street, Milwaukee, Wisconsin, or such other location as announced in advance by the District (if required).

The above schedule is subject to change upon written notice from the District. Schedule changes and/or other RFP revisions, including date, time and place changes, if any, will be sent by written addendum to all firms receiving RFP materials. Proposals may not be submitted via facsimile. Proposals delivered after the date and time due may not be considered.

#### **1.4 Minimum Eligibility Requirements**

Firms or individuals considered for the Provider will have the following minimum qualifications (the "Minimum Eligibility Requirements"):

- 1.4.1 Licensed to do business in the State of Wisconsin.
- 1.4.2 Ability to provide professional advice and management services.
- 1.4.3 Previous experience in providing of a type consistent with the Purpose and Scope of Services set forth in Section 2.0 of this RFP
- 1.4.4 Evidence of professional liability insurance with a minimum limit of \$5,000,000 per claim and in the aggregate and list the District as additionally insured.
- 1.4.5 At least five (5) years' experience with providing similar services for other organizations.
- 1.4.6 At least five (5) current clients to which provider supplies services similar to the Security Services. Provide organization name, address and contact.

Consideration will be given to joint ventures or associations consisting of two (2) or more firms organized for the purpose of serving, as the Provider as long as the firms forming such an entity, as a group, possess the minimum qualifications set forth above.

## 1.5 General Proposal Requirements

Proposers must comply with the following Proposal requirements:

- 1.5.1 Submit eight copies (8), left-side bound originals, and one (1) unbound copy, in a form suitable for photocopying, of all Proposal materials. In addition, submit 1 digital .pdf copy of the proposal via email to khopp@wcd.org.
- 1.5.2 Proposals will be formatted and tabbed in the exact form and numeric sequence as described in Section 3.0 of this RFP. Additional information, if provided, should be added at the end of each Proposal under its own tab(s).
- 1.5.3 Response to all items will be complete.
- 1.5.4 Proposals will be typewritten on one side only using 8-1/2" x 11" paper.
- 1.5.5 All references will be current and, prior to submittal of a Proposal, the Proposer informing them that their names are being so listed must contact the named references.
- 1.5.6 Proposers will complete, executed by a party having signature authority for the Proposer and submit the Acknowledgment and Attestation Form included in Section 4.1 of this RFP.
- 1.5.7 Proposers will complete, execute by a party having signature authority for the Proposer and submit the Fee Proposal Form included in Section 4.2 of this RFP.
- 1.5.8 By submitting a Proposal, Proposers accept in all respects the conditions of this RFP including, but not limited to the following:
  - a. All Proposals will become the property of the District and will not be returned.
  - b. Late Proposal submittals may not be reviewed or evaluated.
  - c. Any restriction as to the use of Proposal materials must be clearly indicated as proprietary, and shall in any event be subject to open records law and any other requirements of applicable law. A requested limitation or prohibition of use or release must be clearly identified in writing on an over sheet. Blanket claims of proprietary submittal will not be honored. Proposers claiming proprietary privileges over their materials shall also agree to indemnify the District for the cost of defending any claims or actions for release or disclosure of the claimed proprietary documents. If the Proposer as a result of the submission of this proprietary information executes a Contract, the District shall have the right to use or disclose it to the extent provided in the Contract.
  - d. The District reserves the right to reject any or all Proposals. Failure by a Proposer to respond thoroughly and completely to all information and document requests in this RFP may result in rejection of its Proposal. Further, the District reserves the right to independently investigate the financial status, qualifications, experience, and performance history of a Proposer.
  - e. The District is not liable for any costs incurred by Proposers in the preparation of Proposals, or for costs related to the Contract execution process.
  - f. The Proposer has reviewed the Purpose and Scope of Services requirements set forth in Section 2.0 of this RFP and agrees that the Proposer can and will meet these requirements if the Proposer is selected as the Provider.
  - g. The District reserves the right to cancel the approval or authorization of a Contract award, with or without cause, at any time before its execution of a Contract and to later enter into a Contract that varies from the provisions of this RFP, if agreed to by another Proposer.

h. The District, in its sole discretion, retains the right to waive any minor irregularity in these or other RFP requirements should it be judged to be in the best interest of the District.

1.5.9 The District has the right to use any or all concepts presented in any reply to the RFP. Selection or rejection of the Proposal does not affect this right. Information provided by the District to the requesting vendor for the purpose of providing a response to the RFP is the property of the District.

#### **1.6 MBE/WBE/DBE/SBE Participation**

The Proposer who is awarded a contract by the District will agree, as a condition of receiving the Contract, to comply with the requirements related to MBE/WBE/DBE/SBE participation (the "Participation Procedures") set forth in Exhibit A of this RFP.

#### **1.7 Proposal Validity**

Proposals shall be valid for at least 90 days from the proposal submission deadline, and in any event through the date on which the District awards the Contract for the Security Services unless a Proposer notifies the District in writing that its Proposal is being withdrawn.

#### **1.8 Closeout Submittals**

The Proposer will provide, in the Proposal, a list of close out submittals to be provided to the District upon the start of the contract.

#### **1.9 Method of Bid**

Proposers are to follow the Fee Proposal requirements set forth in Section 3.12 of this RFP and Fee Form located in Section 4.2. Prices are to be listed in US Dollars unless otherwise indicated. Proposers may then reference any attachments giving further price breakdowns if necessary. Proposers are to provide product brochures, related software, and specifications sheets for all equipment as a part of the bid.

This RFP is designed as a service proposal. Bidders must bid on the complete provision of the Security Services described in this document. A quote submitted in response to this RFP signifies the bidder agrees to provide to the Owner the Security Services, at the discretion of Owner, in accordance with such quote.

#### **1.10 Method of Award**

The contract may be awarded to the lowest qualified and competent bidder. Compliance with the statutory provisions regarding MBE/WBE/DBE/SBE participation shall be considered in the determination of whether the bid is qualified and competent. At the District's option, the Fee and Expenses as well as the scope of may be further negotiated before execution of the Contract.

#### **1.11 Other Project Participants**

An evaluation team has been appointed by the District to review all aspects of the Project.

#### **1.12 Disqualification of Proposal**

The District reserves the right to reject any or all Proposals. Failure by a Proposer to respond thoroughly and completely to all information and document requests in this RFP may result in rejection of its Proposal. Further, the District reserves the right to independently investigate the financial status, qualifications, experience, and performance history of a Proposer.

The District reserves the right to cancel the approval or authorization of a contract award, with or without cause, at any time before its execution of a contract and to later enter into a contract that varies from the provisions of this RFP, if agreed to by another Proposer.

### **1.13 Environmental Sustainability**

Not Applicable

### **1.14 Complete Response**

It shall be the responsibility of the bidder to ensure all specified equipment and scopes-of-work requirements described in the RFP are sufficient to ensure the District is supplied with a fully functional system. Equipment or scope-of-work responsibilities not specifically addressed in the specifications, but realized by the bidder to be essential for system installation and functionality, must be included in the bidder's quote.

### **1.15 Quality Assurance**

The Proposer will create a "Quality Assurance Plan" designed for the District. The plan will be submitted with the Proposal. The Quality Assurance Plan will identify the activities (ie. checklists, process standards, and/or project audit) which is meant to ensure that the District is satisfied with the goods or services the proposer is providing.

## **2.0 Scope of Work:**

The Proposer shall provide appropriately equipped and well-trained State of Wisconsin licensed Security Guards per the specifications for the protection of District facilities, employees, and general public. Ensure that security guards will properly carry out the primary duty of safeguarding the District's facilities, employees and attendees. Proposer shall provide all labor, supervision, material and equipment necessary to complete the Security Services in all respects in accordance with the Contract. Proposer hereby warrants that all Security Services shall be performed in accordance with the Contract. The Proposer shall comply with the District's regulations, policies and procedures.

### **2.1 General Scope Requirements:**

The Proposer will be required to provide two (2) 24 Hour, 365 days a year patrol coverage posts located in two geographically separated facilities and also be required to perform other duties as required by the District Management. The Proposer will provide entrance screening security using walk through metal detectors as provided by and designated by the District as well as event security to all events in any of the three (3) District facilities. Specific coverage and number of security and supervisor personnel will be determined by the District Director of Public Safety and Guest Services using event riders, client needs and vendor input.

2.1.1 The Proposer shall provide an implementation schedule with the Proposal, which shall include a detailed plan showing an orderly progression of events and responsibilities that is realistically directed to the successful implementation of the Contract. The District and the Proposer shall mutually agree upon amendments to the Contract, if any.

2.1.2 The Provider shall furnish all labor, material (other than walk through metal detectors) and supervision to accomplish performance of the Security Services.

2.1.3 None of the Security Services covered by the Contract shall be subcontracted without prior written consent of the District.

2.1.4 The Provider shall be fully responsible to the Wisconsin Center District for the acts and omissions of subcontractors, if such is approved, and of persons directly or indirectly employed of them, as for acts and omissions of persons directly employed by the Provider, and shall indemnify, defend, and hold the District harmless from and against any and all claims, losses, damages, expenses, or liabilities related to same.

### **2.2 Requirements**

All staff positions (Event Security, Event Security Supervisor, and Security Patrol) working under this contract shall report to work on-time and in a consistent uniform provided by the Proposer.

### 2.2.1 Security Patrol Position

- a. Two security posts – 24 hours a day, seven days a week equaling work week of 336 hours. Security 8 positioned in the Wisconsin Center, Security 9 positioned in the UWM Panther Arena and the Miller High Life Theatre. Both patrol positions will do three interior and three exterior tours of the facilities. Round the clock building and asset security, door checks and internal incident and emergency response.
- b. Job Duties shall include, but not limited to
  1. Property patrol
  2. Key control
  3. Employee entry (ID)
  4. Employee entry control (random searches)
  5. Key and card access control
  6. Locking and unlocking facility doors
  7. Equipment monitoring
  8. Escort services
  9. Traffic control
  10. Visitor/contractor entrance
  11. Visitor/contractor control (searches)
  12. Telephone operations
  13. Parking lot control/operations
  14. CCTV monitoring
  15. Report writing
  16. Lost and found control
  17. Evidence gathering
  18. Magnetometer and wand knowledge
  19. Assist with emergency evacuations
  20. Must be CPR/AED certified
- c. Contractor supplied equipment
  1. Security Uniform
    - a. Black belt
    - b. Black pants
    - c. Grey or black uniform shirt
    - d. Neck tie
    - e. Black shoes
    - f. Black socks
    - g. Name plate
    - h. Shield
    - i. Flashlight
    - j. Duty belt (nylon) with key holder, flashlight holder, glove pouch
  - d. Equipment to be Supplied by the District
    1. Radios
    2. Keys
    3. Ipads
    4. Eye and ear protection
    5. Latex gloves
    6. Hand held metal detection wands
- e. Facility Equipment to be used on the job

1. CCTV/DVR
2. CCURE
3. Fire extinguishers
4. Central Command Station
5. Radios
6. Keys
7. Telephones
8. Computers
9. Digital camera
10. Ipads
11. Hand held metal detection wands

f. Contractor issued uniform

1. Uniforms need to have the company name on issued uniform including, but not limited to shirts, jackets, hats. No beanie hats will be worn inside the facility.
2. Uniforms are to be pre-approved by the District.
3. The District has authority to send staff home if they are not wearing proper uniform or the uniform is not presentable in working conditions.
4. Uniforms also includes proper grooming and hygiene for a professional safe environment
  - i. Natural hair color only
  - ii. Long hair will be tied back to be safe
  - iii. Piercings are limited to one stud type earring, one per ear
  - iv. One ring per hand

**2.2.2 Event Security Positions**

a. Event Security Supervisor

1. Assigned to supervisor event security staff
2. Sign in and sign out all security staff
3. Supervise specific areas
4. Communicate with the District Event Managers

b. Event Security staff

1. Positions assigned to various posts per event rider and building requirement
2. Event Security Positions, but not limited to
  - i. Loading dock lower access control
  - ii. Loading dock upper dock security
  - iii. Cut off points
  - iv. Backstage positions
  - v. Entry positions
  - vi. Escort areas
  - vii. Media room
  - viii. Barricade
  - ix. Stage access points
  - x. Roving security
  - xi. Entrance screening
  - xii. Magnetometer screening
  - xiii. Hand held metal detection wand screening
  - xiv. Aisle control

- xv. Food/Beverage assistance (bar areas)
- xvi. ID checks
- xvii. Backstage parking lot control
- xviii. Early load in
- xix. Fire Tower control
- xx. Emergency knowledge
- xxi. Report writing
- xxii. Evidence gathering
- xxiii. General event security positions per event requirements

- 3. Contractor supplied equipment – event security staff
  - a. Black Pants – no jeans, sweats, leggings
  - b. Company issued logoed polo
  - c. Company issued logoed cold weather gear
  - d. Company issued ID badge
  - e. Deployment sheets
  - f. Post orders
  - g. Internal radios
  - h. Additional metal detection hand held wands
  - i. Flashlight
  - j. Ear plugs
- 4. Equipment supplied by WCD and to be used on the job
  - a. Magnetometers
  - b. Metal detection hand held wands

### 2.2.3 Magnetometers

- a. Magnetometers will be provided by the WCD
- b. Contractor will submit a plan for calibration and preventative maintenance at the WCD's expense.
- c. Contractor may use internal staff or an approved third party contractor to assist with this work.
- d. Fees need to be outlined on the Fee Form 4.2. Include in your proposal the complete preventative maintenance plan for the Metal detection hand held wands and Magnetometers.

### 2.2.4 Physical Conditions

General Environment Conditions: Most duties are performed in a climate controlled facilities with some duties performed outside. Security Provider's management will attend planned meetings and provide consultation and recommendation of appropriate staffing levels and positions. Final staffing levels will be ultimately determined on the sole discretion of the District.

- a. Temperatures: Some outdoor duties in extreme hot and cold temperatures.
- b. Noise levels: Usually low to moderate at times may be high.
- c. Odors: None
- d. Number of buildings: 3 (three)
- e. Some parking lot duties required
  - 1. Surface parking lot - State Street
  - 2. Surface parking lot – Wells Street
  - 3. Loading dock – Wisconsin Center building
- f. Number of entry points/exterior doors: Numerous throughout the District facilities.
- g. Visibility: Excellent
- h. Lighting: Excellent. However, some patrol areas may have reduced lighting.

- i. Frequency of 24/hr patrol rounds: 3 (three) per shift
- j. Frequency of event security – varies with amount of events within facilities
- k. Time spent on patrol rounds: 1.5 to 2 Hours
- l. Stairs or unusual Patrolling Requirements: numerous stairs throughout all WCD Facilities.
- m. Other: Officers must be able to successfully interact with large number of people.

**2.2.5 Safety**

- a. The WCD is a smoke and tobacco free neighborhood – no smoking anywhere on WCD property.
- b. Security Patrol Staff and Event Security Staff will be able to identify the locations of
  - 1. Fire alarms: Throughout facilities.
  - 2. Emergency phones: Throughout facilities.
  - 3. Fire extinguishers and type: Throughout Facilities - All Purpose
  - 4. Fire Hoses: Located in Theatre and Arena Only
  - 5. Hazardous Materials: varies, mostly trades areas
- c. Security Patrol duties in the event of:
  - 1. Fire: Respond, identify, report, contain if possible and safe, and assist in evacuation and crowd control.
  - 2. Natural Disaster: Assist in evacuation and crowd control.
  - 3. Bomb Threat: Respond, identify, report, assist in searching if requested, evacuation and crowd control
  - 4. Active Shooter: Assist with direction, assist with law enforcement as requested
- d. District alarm systems:
  - 1. Fire Alarm System: Simplex system/monitor and dispatch only
  - 2. CCure 9000 Security access and alarm system: All aspects of monitoring, controlling, reacting and dispatching patrols during alarm situations
- e. District Supplied; Required safety equipment use:
  - 1. Eye
  - 2. Ear
  - 3. Bodily fluid

**2.2.6 Employee Screening Process**

- a. Provided and funded by the Contracted company.
- b. Successfully complete criminal background check / investigations for all contractor employees and agents.
- c. Successfully complete drug screening (five) 5-Panel Test.
- d. Each contractor supplied staff member must be licensed by the State of Wisconsin per Wisconsin State regulations concerning security services.
- e. The successful provider must comply with the minimum process for hiring staff assigned to work the District events as described.

**2.2.7 Special Considerations**

- a. Proficient in computer usage to include Microsoft Products
- b. Ability to escort funds to include various areas, but not limited to
  - 1. Production offices
  - 2. Concession stands
  - 3. Exhibit booths
  - 4. Box office
- c. Overtime/holiday pay shall not be the responsibility of the WCD unless specifically requested by

- WCD management
- d. Contractor supplied staff shall be able to read, write and speak the English language to acceptable level. Must prove capability to WCD management prior to being assigned to the WCD.
  - e. Contractor supplied staff must be able to:
    1. Stand for long periods of time
    2. Walk for extended periods of time on flat surfaces and stairs
    3. Run during situations requiring immediate response
    4. Contractor to provide trained relief for WCD security officers for security officer no-shows, call offs or leaving post due to illness/injury shall be accomplished within one (1) hour of WCD notification to security company management. Failure to provide this relief in a timely manner will be cause for WCD and security company management meeting to discuss possible action.
  - f. On-duty contractor supplied staffing shall not leave their posts, for any reason, without permission from WCD Management. This includes, but not limited to,
    1. Relief officer not reporting as scheduled,
    2. Late security officer reporting or
    3. Unauthorized leaving post.
  - g. Security company management representatives shall make themselves telephonically available 24 hours a day 365 days year. Contractor to provide the District with a 24 hour call center.
  - h. A list of Security company contact representatives shall be placed in the WCD Public Safety dispatch center and updated at least every six (6) months or sooner when the Security company's management contacts change. All changes will be made within 24 hours of additions or deletions of security companies management contact changes and forward and posted in the WCD Public Safety dispatch center.
  - i. Security company must submit procedures for effective management control for post visits, officer discipline, and other administrative actions required for smooth security operations.

#### **2.2.8 Mandatory Security Staff Training**

The Proposer will provide to the District, with the Proposal, a complete training plan. The training plan shall include, but not limited to the number of hours each employee will be trained prior to working at the District. All training must be completed and accepted by WCD management prior to the contracted staff performing duties at the WCD. Contactor shall ensure that newly assigned staff are trained to include, but not limited to the following areas:

- a. Patrol and observation techniques
- b. Report writing
- c. Customer service and public relations
- d. Fire safety
- e. Bomb recognition
- f. Conflict management
- g. Interpersonal skills
- h. Incident investigation
- i. Crime prevention
- j. Handling threatening and hostile individuals
- k. Computer operations
- l. Emergency call procedures
- m. Emergency evacuation procedures
- n. Active shooter training
- o. Magnetometer training
- p. Compiling honest/accurate tour log sheets
- q. Operation of two-way radio, telephone
- r. Suspicious package procedures
- s. CPR, first aid, and defibrillation certified
- t. On-site training - minimum of three (3) eight (8) hour shifts for all 24/hr patrol guards.

### **2.2.9 Billing and Reporting (New)**

- a. Preparing invoices
  - 1. All invoices shall be prepared for individual events
  - 2. Invoice preparation is the responsibility of the Security Company.
  - 3. WCD is tax exempt.
  - 4. Prices shall remain firm for the term of the contract, including renewals.
- b. Distribution of Invoices
  - 1. Contractor agrees to provide the District an invoice towards the end of an event which is being settled with the promoter that night.
  - 2. Unless otherwise requested by the District, event invoices shall be submitted within 48 hours of conclusion of an event.
  - 3. All invoices shall be received electronically via email.
- c. Payment of Invoices
  - 1. The WCD's Director of Public Safety and Guest Services, prior to payment, must review and approve all bills.
  - 2. Payment terms are net 30 day.
  - 3. Invoice reconciliation must occur within (3) three-months of invoice date.
  - 4. Invoices submitted for payment beyond (6) six month period may not be honored.
  - 5. The Contractor shall not impose payment penalties of any kind, including, but not limited to late fees, service charges, cancellation fees, interest, or placing the District on credit hold.
- d. The Proposer shall furnish at its expense, all labor, taxes, FICA, Worker's Compensation, uniforms, unemployment insurance, equipment, supplies, transportation (including fuel surcharge if applicable), insurance, and other expenses necessary to fully perform any phase of the requirements of this RFP.
- e. In the event that, during the term of the agreement, the successful Proposer is required to increase wages and/or payroll burden costs as a direct result of any determination or action by any Federal, State or Local Government authority, the District agrees to permit the successful Proposer to increase it rates proportionally from the date the increase becomes law. The increase(s) cannot be implemented until the Districts Purchasing Department receives a new rate schedule and a letter explaining in detail the circumstances necessitating the increase. Proposers should be aware of any and all possible increases in wages, Social Security, Federal, State, and Local taxes which may apply during contract term and make the District aware of the same.
- f. The District will not pay overtime unless approved in advance by the Director of Public Safety or his/her designee.

### **2.3 Execution**

Describe in your proposal the Proposer's approach to the Scope of Services, including the Proposer's methods and abilities related to staff scheduling, dispatching and handling emergency services. Note any value-added services provided by Proposer.

### **2.4 Time & Essence**

The maintenance of a firm schedule of completion is of critical importance to the District. The failure to conclude implementation and adjustment within the time periods set forth herein and specified by the District will cause the District substantial loss of revenue and reputation. The Contract will therefore contain a provision that if the implementation of security services is not completed by September 1, 2019, the Proposer shall bear, as liquidated damages, a cost of \$5,000 for each day the implementation exceeds the schedule, which amount may be offset against amounts payable to Proposer, or sought as damages against Proposer, as the District deems appropriate.

### **3.0 PROPOSAL REQUIREMENTS**

Proposals must be submitted to the District on or before 27 March 2019, at 12:01 p.m., Central Time, unless the District announces a different, later time by addendum.

#### **3.1 Cover Letter**

The Proposer's cover letter will identify the name, address, telephone number, facsimile number (if any), email address and contact person for the Proposer.

#### **3.2 Table of Contents**

The Proposal Table of Contents will conform to the titles and numeric sequence of this Section 3.0.

#### **3.3 Statement of Eligibility**

The Proposer will demonstrate that it meets the Minimum Eligibility Requirements set forth in Section 1.4 of this RFP.

#### **3.4 Executive Summary**

The Proposer will prepare an executive summary, which will contain a commitment by the Proposer to provide the Security Services in accordance with the Purpose and Scope of Work, as described in Section 2.0 of this RFP (the "Executive Summary"). The Executive Summary will include a statement of the Proposer's understanding and general approach toward providing the services or installation.

#### **3.5 Proposer Identity and Structure**

Submit a description of the legal structure of each entity, which comprises the Proposer. This will include identification of each participating principal member, partner or co-venture, specifically noting any which are certified MBE's and/or WBE's as required under Exhibit A of the Contract. Proposals submitted by joint ventures or associations must include one of the following: (i) a copy of the joint venture agreement with original signatures, or (ii) a memorandum of agreement, which fully discloses the relationship between entities of the joint venture. Exclusive arrangements with subcontractors for proposal submissions are discouraged.

#### **3.6 Qualifications and Prior Experience**

For each entity, which comprises the Proposer, provide background materials and information as to its qualifications and technical experience regarding performed for other clients. This should include:

- 3.6.1 Client name, business address and email address.
- 3.6.2 Description of services provided by the Proposer and amount of years serviced.
- 3.6.3 Project reference(s), current name, address, telephone, email address and facsimile numbers.
- 3.6.4 General statement of experience.

Provide a verifiable statement of the Proposer's experience in providing this type services and installation. Telephone numbers and email addresses of references for each project listed must be provided.

##### **3.6.5 Financial Statements.**

The Proposer's last three fiscal years' annual financial statements certified by a nationally or regionally recognized firm of Certified Public Accountants.

##### **3.6.6 Additional Resources.**

The Proposer may, at its discretion, describe other resources or special qualifications, which are relevant to providing professional services.

### **3.7 Key Personnel and Qualifications**

Provide an organizational chart with a description of the responsibilities for key personnel. Provide resumes for all key personnel to be assigned for the project. The District reserves the right to approve all personnel assigned to the Wisconsin Center District. Furthermore, the District reserves the right to require the removal of any personnel.

### **3.8 Organizational Structure and Responsibilities**

Provide a detailed description of Proposer's approach to the assignment, including key personnel, their titles and names, and staffing levels in accordance with the Purpose and Scope of the project. Identify all portions of the Services, which the Proposer intends to perform with its own employees. Indicate local availability of key personnel throughout the duration of the assignment.

### **3.9 Work Plan Outline**

Provide a detailed Work Plan Outline defining your proposed scope of services, capability, and estimated level of effort, methodology and strategy for providing each of the identified in Section 2.0 of this RFP (the "Work Plan Outline"). The Proposer is encouraged to elaborate upon the stated requirements, indicating its experience or individual skills, overall project approach and methodology, to create a draft outline of the complete project.

#### **3.9.1 Policy Statement**

A statement describing the Proposer's existing operating policies addressing the following personnel areas: hiring, training, scheduling performance, evaluation and discipline of all personnel categories to be utilized by the Proposer.

### **3.10 MBE/WBE/DBE/SBE Participation**

Describe how the Proposer will meet or exceed the MBE/WBE/DBE/SBE Participation Level for its specifically describing how MBE, WBE, DBE and SBE firms will be utilized throughout the Contract period. Specific individuals or certified firms need not be identified as part of the Proposal, but must be identified prior to Contract execution. The District encourages race and gender diversity in managerial, supervisory and other professional persons providing goods and services.

### **3.11 Acknowledgement and Attestation Form**

A party having signature authority for the Proposer must complete and execute the Acknowledgment and Attestation Form, Section 4.1 of this RFP. Witnessing of a corporation's officers will be by corporate secretary; witnessing of a sole proprietor will be by a notary public; witnessing of partnerships, limited liability companies and joint ventures will be by partners.

### **3.12 Insurance**

Submit proof of Proposer's insurance coverage for each of the following liability insurance coverage (minimum policy limits in brackets):

- a. Worker's compensation insurance (statutory limits).
- b. Commercial and Professional General Liability Coverage including but not limited to all coverage's standard to the 1995 ISO form (not less than \$5,000,000 per claim and in the aggregate).

### **3.13 Performance Bond**

Performance Bond to extend over all phases of the Contract / project with time line penalties, if not completed within dates selected.

### **3.14 Statement Regarding Proposed Contract**

Provide a statement either that (a) all proposed terms and conditions of the Contract are acceptable, or (b) the terms of the proposed Contract are acceptable, except for those matters identified by section number in chronological sequence. For each matter so identified, the Proposer will briefly describe the Proposer's concerns and supply its proposed alternative.

### **3.15 Fee Proposal**

Provide a proposed fee for the Contract as described in this RFP. The Proposer will complete and execute the attached Fee Proposal Form, Section 4.2 of this RFP, by a party having signature authority for the Proposer.

### **3.16 Environmental Sustainability**

N/A

### **3.17 Proposer Affidavit**

Provide a proposed fee for the Contract as described in Section 1.2 of this RFP. The Proposer will complete and execute the attached Fee Proposal Form, Section 4.2 of this RFP, by a party having signature authority for the Proposer.

### **3.18 Disqualification of a Proposer/Proposal**

Wisconsin Center District (the District) reserves the right to reject any or all proposals. Failure by a Proposer to respond thoroughly and completely to all information and document requests may result in rejection of its proposal. Further, the District reserves the right to independently investigate the financial status, qualifications, experience, and performance history of a Proposer.

The District reserves the right to cancel the approval or authorization of a contract award, with or without cause, at any time before its execution of a contract and to later enter into a contract that varies from the provisions of this RFP, if agreed to by another Proposer.

### **4.0 Forms**

Fill out the forms in section 4.0. Submit all forms back to the Wisconsin Center District as requested on each form. The only exception is Form 4.3 for use by the Proposer.

**4.1 ACKNOWLEDGEMENT AND ATTESTATION FORM**

In submitting a Proposal the undersigned certifies that the Proposer has reviewed the Request for Proposals and Addendums A, B, and C attached thereto, is familiar with their terms and conditions, and accepts the requirements imposed by them on the Proposer.

I hereby certify that the foregoing is true and correct.

Proposer's Name: \_\_\_\_\_

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

Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

Witness: \_\_\_\_\_

Name: \_\_\_\_\_

Title: \_\_\_\_\_

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

OR

Subscribed and sworn to before me this

\_\_\_\_\_ Day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Notary Public, State of \_\_\_\_\_

My Commission: \_\_\_\_\_

NOTE: Use full corporate name and attach corporate seal here.

[SEAL]

**4.2 NOT TO EXCEED FEE PROPOSAL FORM**

4.2.1 Provide a complete detailed breakdown to describe the Security Services being provided, anticipated conditions of the work, terms of the Services, and associated costs so as to demonstrate as complete an understanding as possible of the Security Services provided and the costs associated therewith.

4.2.2 The Fees for the Contract:

Proposer shall compensate its employees engaged in the provision of the Security Services at the following rates:

Standard Employee Rate	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
	September 1, 2019 – August 31, 2020	September 1, 2020 – August 31, 2021	September 1, 2021 – August 31, 2022	September 1, 2022 – August 31, 2023	September 1, 2023 – August 31, 2024
Event Security Standard Hourly Labor Rate					
Event Security Supervisor Labor Rate					
Security Patrol Officer Standard Labor Rate					

The District shall reimburse the Proposer for its costs of employee engaged in the provision of the Security Services at the following rates:

Standard District Rate	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
	September 1, 2019 – August 31, 2020	September 1, 2020 – August 31, 2021	September 1, 2021 – August 31, 2022	September 1, 2022 – August 31, 2023	September 1, 2023 – August 31, 2024
Event Security Standard Hourly Labor Rate					
Event Security Supervisor Labor Rate					
Security Patrol Officer Labor Rate					

Proposer's labor rate structure with regard to payment of overtime, double time, Holidays, and the like is as follows:

Labor Rate	Labor Rate Description (i.e. days to which each category of pay applies, and hours in each day to which each category applies)
Standard	
OT	
Double Time	
Other	
Holiday Pay	

WCD will honor the following Holiday's for Holiday Pay. A list to identify the actual date will be provided to the Proposer upon the start of each year of the Contract.

New Year's Day	Memorial Day	Independence Day	Labor Day
Thanksgiving Day	Christmas Day		

PM Program for Metal Detection hand held wands and Magnetometers: Identify name of third party service provider that will supply services and annual fees to be charged by such provider, which fees will be paid, without markup, directly by the District to such provider upon the same terms and conditions as set forth in this Contract.

Service Provider Name / Contact Phone number					
	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
Annual Fees					
Provide the complete PM program proposed by the Service Provider.					

4.2.3 Attach to this Fee Proposal Form a complete, detailed breakdown, including, but not limited, to:

- a. Cost of all personnel to be charged to the Security Services, and hourly salary rates, projected rate escalation and the multiplier applied to each type of personnel so identified for federal and state taxes, unemployment compensation, insurance and employee benefits (the "Personnel Costs").
- b. Identify the amount established by the Proposer as its markup for all overhead and profit (the "Overhead and Profit").

4.2.4 The Proposer shall not impose payment penalties of any kind, including, but not limited to late fees, service charges, cancellation fees, interest, or placing the District on credit hold. (also identified in Section 2.2.8)

### 4.3 PROPOSERS CHECKLIST:

#### Bidders Checklist:

- Bid proposal meets specifications. If no, provide Form 4.6 (Yes) (No)
- Proposal is in order as requested (Yes) (No)
- Requested Forms are attached. Example: sample insurance certificate and section 4 forms (Yes) (No)
- References are included with the proposal and have email and phone contact information (Yes) (No)
- List of 5 similar work locations attached per specifications (Yes) (No)
- If applicable, is the Performance/ Payment Bond pricing covering entire project (Yes) (No)
- Appropriate Documents Notarized (Yes) (No)
- Quality Assurance Plan included (Yes) (No)
- MBE/DBE/SBE/WBE participation rates identified (Yes) (No)
- Training Program covered in your Proposal (Yes) (No)

4.4 CERTIFICATE OF BIDDERS

CERTIFICATE OF BIDDERS

STATE OF \_\_\_\_\_

COUNTY OF \_\_\_\_\_

\_\_\_\_\_ certifies that he has authority to submit this bid on behalf of \_\_\_\_\_ and that he has examined (Name of Corporation, Partnership, or Individual) and carefully prepared this bid from the plans and specifications, and he has checked it in detail before submitting it to the Wisconsin Center District.

\_\_\_\_\_  
(Signature of Authorized Representative)

\_\_\_\_\_  
(Title)

Subscribed and sworn before me this \_\_\_\_\_ day of \_\_\_\_\_, 2013.

My commission expires \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
(Notary Public sign and seal)



4.6 NOTICE OF INTENT TO BID FORM - WCD Security Services

Due Friday, March 15th by 12:01 pm CST

(Please check one)

We shall submit a proposal

We shall NOT submit a proposal;

Contact Person: \_\_\_\_\_

Title: \_\_\_\_\_

Company Name: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State and Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

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

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

**Vendors who do not submit this NOTICE OF INTENT TO BID form by the due date, may be removed from our Vendor list for these services. Please e-mail this form to:**

**Karen Hopp  
Purchasing & Special Projects Manager  
Email: [Khopp@wcd.org](mailto:Khopp@wcd.org)  
Phone: 414-908-6073**

#### 4.7 Questions for Bidders

Submit your answers with the Proposal

1	Identify the number of employees that are available in the Milwaukee Area employed by your company that meet the qualifications of this RFP?
2	Identify how many trained Security Patrol staff you will have in your labor pool based upon having consistent assigned staff on-site.
3	Identify how many trained Event Security staff you will have in your labor pool based upon the potential of having 110 staff on site at one time.
4	Identify how many trained Event Supervisors you will have in your labor pool? Would you consider this a full time or part time position?
5	What is the cost to bring in staff from outside of the Milwaukee area?
6	How many back up staff will be trained for each of the positions?
7	If the District is short staff for either Security Patrol and Event Security, what is your response time for being short staffed for Security Patrol and Event Security?

## EXHIBIT A

### REQUEST FOR PROPOSALS MBE/WBE/DBE/SBE PARTICIPATION PROCEDURES

#### 1.1 Policy

The District hereby notifies all Proposers that the District will afford Minority Businesses ("MBEs") and Women's Businesses ("WBEs), as defined in secs. 66.905(1)(a), 560.036(1)(f) and 229.46(1)(c), Wis. Stats., respectively, a full opportunity to submit bids in response to the District's advertisements. The District and Proposer will insure that no one will be discriminated against in the awarding of any District contract or subsequent contract participation on the grounds of sex, race, color, national origin, sexual orientation, religious belief, age or disability. The Proposers shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, ancestry, sexual orientation, gender identity or expression, familial status, legal source of income, veteran status, or disability unrelated to job requirements. The Proposers shall take affirmative action to ensure that applicants are employed, and employees are treated during employment, without regard to the above characteristics, including without limitation with regard to following: advertising for positions, layoff or termination, rates of pay, other forms of compensation, selection for training and conditions of employment. The Proposers agree to post in conspicuous places which are available to employees and applicants for employment all non-discrimination notices which are required by law and/or provided by the District.

The Proposers agree, in all solicitations or advertisements for employees placed by or on behalf of the Proposers, to state that all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, ancestry, sexual orientation, gender identity or expression, familial status, legal source of income, veteran status, or disability unrelated to job requirements.

The Proposers shall comply with the District's Affirmative Action Program to assure non-discrimination and fair employment practices.

#### 1.2 Participation Level

The District, consistent with the need to achieve equitable MBE/WBE utilization to overcome past and present effects of race and gender discrimination in bidding on public projects, has established participation levels for the Proposer for MBE firms of 25% and for WBE firms of 5% (the "Participation Level") as more fully defined in Section 1.5 of Exhibit A.

#### 1.3 Response to Participation Level

If a Proposer meets the MBE and WBE Participation Level set forth in the RFP, including this Exhibit A, it will be considered fully responsive to the Participation Level requirements.

If a Proposer asserts it cannot achieve either or both of the percentages for the MBE and WBE Participation Level percentages, its Proposal will be deemed responsive if, and only if, it meets the good faith efforts requirements of these MBE/WBE Participation Procedures. Specifically the Proposer will submit, within forty-eight (48) hours after receipt of notification and request from the District, full written documentation which evidences the Proposer's good faith efforts to achieve the Participation Level, including, in detail, what efforts were taken to comply with the MBE/WBE provisions of the RFP and this Exhibit A. In the event the Proposer and the District disagree as to whether good faith efforts sufficient to comply with the Participation Level requirement have been made, the Proposer may file a claim with a neutral three (3) member panel established by the District. The decision rendered by the panel as to compliance with this Section 1.3 shall be binding on the parties.

#### **1.4 MBE/WBE Participation Methodology**

The District has reviewed evidence of exclusion of minority and women's businesses from opportunities to bid on public projects in this geographic area. It has determined that there continues to be a significant disparity between the number of qualified MBE and WBE firms which are willing and have sufficient technical skills to perform particular services and the number of such contractors who actually perform such work as either prime contractors or subcontractors. Recent state and local efforts to promote public bidding opportunities in a race-neutral and gender-neutral way through small business enterprise and disadvantaged business enterprise requirements, training and other efforts of local trade groups, and implementation of MBE/WBE "goals" have not fully resolved this disparity.

The District will not passively participate in disparate treatment which discriminates on the basis of race and/or gender, but recognizes that it must narrowly tailor remedies to this problem to have the least possible impact on those who do not qualify for the consideration given by the District to compensate for past and present discrimination. Toward that end, the District will utilize a variety of race-neutral and gender-neutral provisions for the Project, including specific planning related to mobilization funding, increased payment frequency, reduced bonding requirements, phasing of larger portions of the services into smaller portions more capable of being successfully performed by smaller businesses, and a training and mentoring program. In addition, the District will implement the MBE/WBE Participation Level as part of the process to avoid discrimination in contracting affiliated with the District.

The District seeks and encourages advice and suggestions from Proposers regarding the pro-active measures the District can take to assist the Proposers in meeting the MBE/WBE Participation Level.

#### **1.5 Method of MBE/WBE Participation Level Calculation**

The Proposer will be guided by the following criteria to determine if the MBE and WBE components of the MBE/WBE Participation Level have been met:

1.5.1 An MBE or WBE may participate as a prime contractor, subcontractor, joint venture partner with a prime or subcontractor, or vendor of materials, supplies, equipment or trucking.

1.5.2 An MBE or WBE joint venture partner must be responsible for a clearly defined portion of the work to be performed, in addition to satisfying the statutory requirements for ownership and control.

1.5.3 An MBE or WBE must perform a commercially useful function, i.e., must be responsible for the execution of a distinct element of the Security Services and must carry out its responsibility by actually performing, managing and supervising the work involved. To determine whether an MBE or WBE is performing a commercially useful function, the Proposer and District will evaluate the amount of services subcontracted, usual and customary industry practices, and other relevant factors.

1.5.4 Credit for the participation of MBE and WBE vendors of materials, equipment and supplies is to be counted as follows:

1.5.4.1 One hundred percent (100%) of the expenditures for materials and supplies required under the Contract and obtained from wholesale or retail distributor that owns, operates, or maintains a store, warehouse, or other establishment in which the materials or supplies required for the performance of the Security Services are bought, kept in stock and regularly sold to the public in the usual course of business. The distributor must engage in, as its principal business, and in its own name, the purchase and sale of the products in question.

- 1.5.4.2 One hundred percent (100%) of expenditures for materials and Supplies obtained from an MBE or WBE manufacturer or from an MBE or WBE supplier who substantially alters the material before resale.
  - 1.5.4.3 Sixty percent (60%) of the expenditures for materials and supplies required under the Contract and obtained from a wholesale broker, retail broker or packager that owns, operates or maintains an establishment in which the materials or supplies required for the performance of the Project are ordered, not kept in stock and/or not regularly sold to the public in the usual course of business. The broker or packager must engage in, as its principal business, and in its own name, the brokering or packaging of the products in question.
- 1.5.5 The total Participation Level will be calculated as follows:
- 1.5.5.1 Separately identify the following amounts relating to all MBEs and all WBEs ("Actual Participation"):
    - (1) The contract amounts for all Proposer Services Subcontracts.
    - (2) The contract amounts (as established in Section 1.5.4 above) for all Proposer Services materials, supplies, trucks and/or equipment.
    - (3) The dollar value of all work performed with the Proposer's own forces if the Proposer is an MBE and WBE sole proprietorship or corporation. If the Proposer is an MBE or WBE joint venture, partnership, limited liability company or other type of legal entity combining MBE or WBE and non-MBE or non-WBE components, the Proposer will include only the MBE or WBE proportionate interest in the entity.
  - 1.5.5.2 Separately identify the following amounts anticipated for all future MBE and all future WBE participation ("Anticipated Participation"):
    - (1) The anticipated contract amounts for all Proposer Services Subcontracts.
    - (2) The anticipated contract amounts (as established in Section 1.5.4 above) for all Proposer Services materials, supplies, trucks and/or equipment.
    - (3) The anticipated dollar value of all work performed with the Proposer's own forces if the Proposer is an MBE or WBE sole proprietorship or corporation. If the Proposer is an MBE or WBE joint venture, partnership, limited liability company or other type of legal entity combining MBE or WBE and non-MBE or non-WBE components, the Proposer will include only the anticipated MBE or WBE proportionate interest in the entity.
  - 1.5.5.3 Based on the amounts derived for Sections 1.5.5.1 and 1.5.5.2:
    - (1) Add the Actual Participation plus the Anticipated Participation ("Total Participation").
    - (2) Divide Total Participation by the approved Not to Exceed Fee.

The following formulas reiterate the above procedures:

$$\frac{\text{Actual MBE Participation} + \text{Anticipated MBE Participation}}{\text{Not to Exceed Fee}} = \text{MBE Participation Level}$$

Actual WBE Participation + Anticipated WBE Participation

Not to Exceed Fee

= WBE Participation Level

**1.6 MBE/WBE/DBE/SBE Participation**

The Proposer who is award a contract by the District will agree, as a condition of receiving the Contract, to comply with the requirements of Wis. Stats. Section 229.46, which states....

*"229.46 certain contracting requirements.*

*(1) In this section:*

- (a) "Minority business" has the meaning given in s. 66.905(1) (a).*
- (b) "Minority group member" has the meaning given in s. 560.036(1) (f).*
- (c) "Women's business" means a sole proprietorship, partnership, joint venture or corporation that is at least 51% owned, controlled and actively managed by women.*

*(2) A person who is awarded a contract by a district shall agree, as a condition to receiving the contract, that at least 25% of the employees hired because of the contract will be minority group members and at least 5% of the employees hired because of the contract will be women if any of the following applies:*

- (a) The contract is for the construction of any part of an exposition center.*
- (b) The contract results in the hiring of individuals who will work at the exposition center.*

*(3) At least 25% of the aggregate dollar value of contracts awarded by the district in the following areas shall be awarded to minority businesses and at least 5% of the aggregate dollar value of contracts awarded by the district in the following areas shall be awarded to women's businesses:*

- (a) Contracts for the construction of an exposition center.*
- (b) Contracts entered into by the district for the purchase of services to be performed at the exposition center.*
- (c) Contracts for the underwriting of bonds.*

*(3m) It will be a goal of a district, with regard to each of the contracts described under sub. (3)(a), (b) and (c), to award at least 25% of the dollar value of such contracts to minority businesses."*

*"66.905 Minority business development and training program. (1) DEFINITIONS. In this section:*

*(a) "Minority Business" means a sole proprietorship, partnership, joint venture or corporation that is at least 51% owned and controlled by one or more minority group members and that is engaged in construction or construction-related activities."*

*"560.036 Minority businesses. (1) DEFINITIONS. In this section:*

- (a) *"American Indian" means a person who is enrolled as a member of a federally recognized American Indian Tribe or band or who possesses documentation of at least one-fourth American Indian ancestry or documentation of tribal recognition as an American Indian.*
- (b) *"Asian-Indian" means a person whose ancestors originated in India, Pakistan or Bangladesh.*
- (c) *"Black" means a person whose ancestors originated in any of the black racial groups of Africa.*
- (d) *"Hispanic" means a person of any race whose ancestors originated in Mexico, Puerto Rico, Cuba, Central America or South America or whose culture or origin is Spanish.*
- (f) *"Minority group member" means any of the following:*
  - (1) *A Black.*
  - (2) *A Hispanic.*
  - (3) *An American Indian.*
  - (4) *An Eskimo.*
  - (5) *An Aleut.*
  - (6) *A native Hawaiian.*
  - (7) *An Asian-Indian.*
  - (8) *A person of Asian-Pacific origin,*
- (g) *"Person of Asian-Pacific origin" means a person whose ancestors originated in Japan, China, Taiwan, Korea, Vietnam, Laos, Cambodia, the Philippines, Samoa, Guam, the U.S. Trust Territories of the Pacific or the Northern Marianas."*

The Proposal should indicate how the Proposer expects to comply with these statutory requirements. Following the award of the Contract, the Proposer shall provide such reports and supporting information as the District may request to demonstrate compliance with these statutory requirements.

**1.7 MBE/WBE Contract Compliance Reporting, Substitution of Subcontractors and Other Requirements.**

- 1.7.1 The Proposer will submit to the District a Utilization Form as to MBE and WBE participation on a quarterly basis in a form complying with the requirements of Section 4.3 of the Request for Proposals for The services provided.
- 1.7.2 The Proposer will submit to the District copies of all executed MBE and WBE Subcontracts within fifteen (15) days after they are awarded the contract.
- 1.7.3 The Proposer will:
  - 1.7.5.1 Negotiate in good faith to attempt to finalize Subcontracts Consistent with these MBE/WBE Participation Procedures.
  - 1.7.5.2 Notify its MBE and WBE Subcontractors in writing of any potential problems and attempt to resolve them prior to formally requesting approval from the District to substitute and MBE and WBE.

- 1.7.5.3 Make payments of all monies due and owing to its MBE and WBE Subcontractors no later than seven (7) days after receipt of payment from the District.
- 1.7.5.4 Submit all invoices received from its MBE and WBE subcontractors to the District within thirty (30) days after receipt of them.
- 1.7.5.5 Inform the District, in a timely manner, of any problems anticipated in its attaining of the MBE/WBE Participation Level or affecting continued MBE and WBE participation agreed to under the Contract executed by the District and the Proposer.
- 1.7.4 If the Proposer, after execution of the Contract, requests a substitution of Subcontractors, the Proposer will use good faith efforts to replace a MBE Subcontractor with another MBE firm, and to replace a WBE Subcontractor with another WBE firm, subject to approval of the District.
- 1.7.5 The Proposer will obtain the written consent of the District prior to making any substitutions of its MBE and WBE Subcontractors.
- 1.7.6 The Proposer will make a written submittal of any requested substitute MBE and WBE Subcontractor(s). The list will include the dollar value and the type of services to be performed by each submitted Subcontractor. No later than twenty (20) days after approval of a substitution, the Proposer will submit a copy of each Subcontract entered into with subsequent MBE and WBE firms to the District.
- 1.7.7 The Proposer will not falsify any information related to any Subcontract, including, but not limited to, its Subcontractor's name, and/or actual work to be done by such MBE or WBE firm.
- 1.7.8 The Proposer will maintain the MBE/WBE Participation Level throughout Performance of the Services Provided.

**1.8 Audit and Inspection**

The District reserves the right to audit the records and inspect the facilities of the Proposer and any of its Subcontractors of any tier for the purpose of verifying the MBE/WBE participation. The Proposer and its Subcontractors will permit access to their records upon the request of the District. Notice is hereby given that state, local and federal authorities may initiate or cooperate with the District in auditing and inspecting such records.

**1.9 Remedies for Failure to Comply with MBE/WBE Participation Levels**

All intended Proposers and the successful Proposer are hereby notified that, should the Proposer be found in violation of the District's MBE and WBE Participation Levels during the performance of the services under the Contract, the Proposer may be subject to sanctions, up to and including, but not limited to, withholding of all or any part of the payment due the Proposer and said Subcontractors, termination of the Contract for cause and rejection of future proposals to the District.

**1.10 Participation**

**Plan**

The District accepts the Provider's Participation Plan attached as Exhibit of this Contract for the Project.

**1.11 DBE/SBE Participation**

The Provider shall calculate DBE and SBE participation in the Project provision of the Security

Services, and shall provide same to the District on a quarterly basis along with the submission required under Section 1.7.1 above. The City of Milwaukee in writing must certify DBE firms. SBE firms shall provide sworn written certification to the District that they conform to the definition of SBE.

**EXHIBIT B**  
**MAPS OF FACILITIES**

**EXHIBIT C**  
**FORM OF CONTRACT**

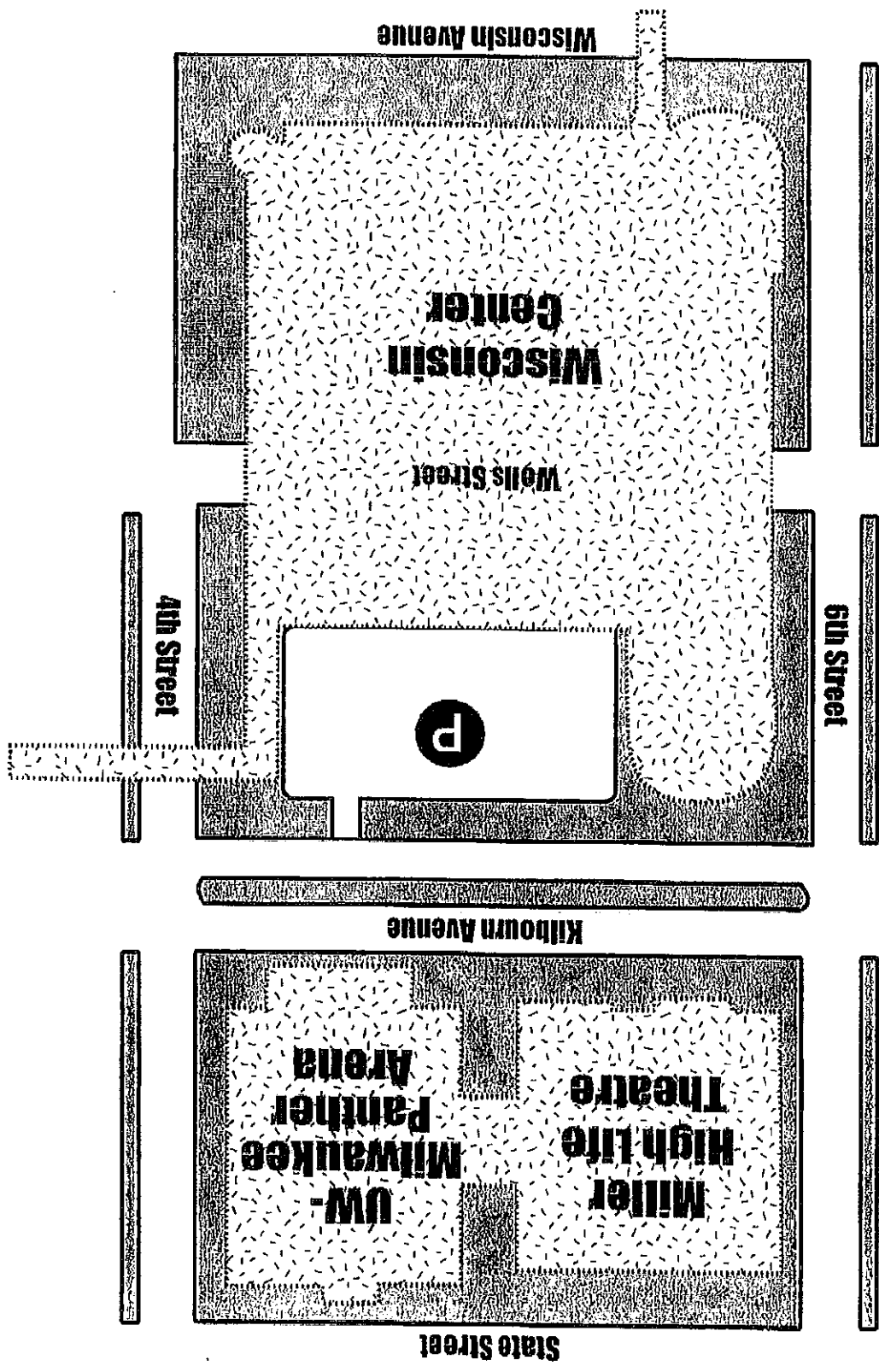
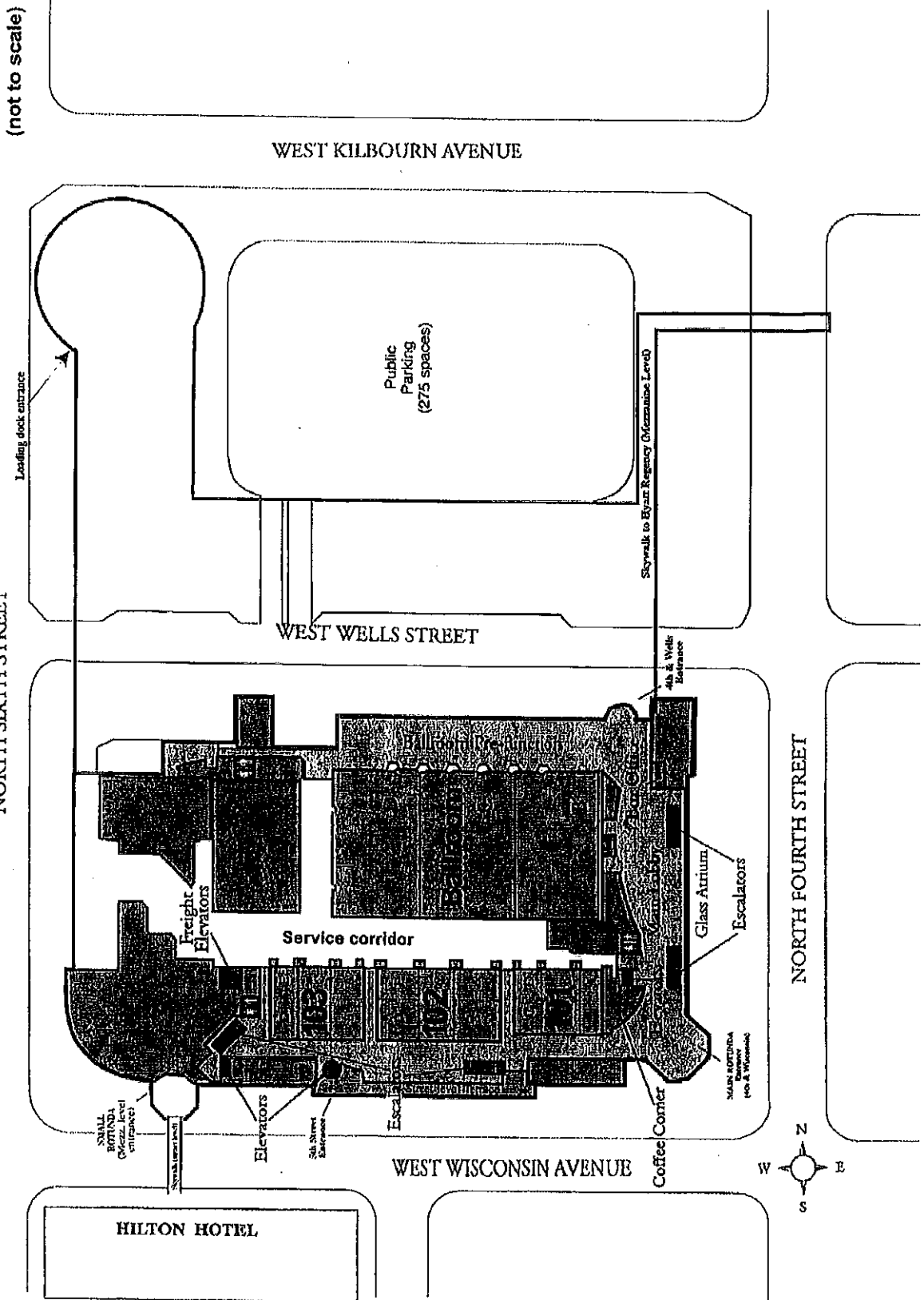


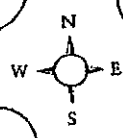
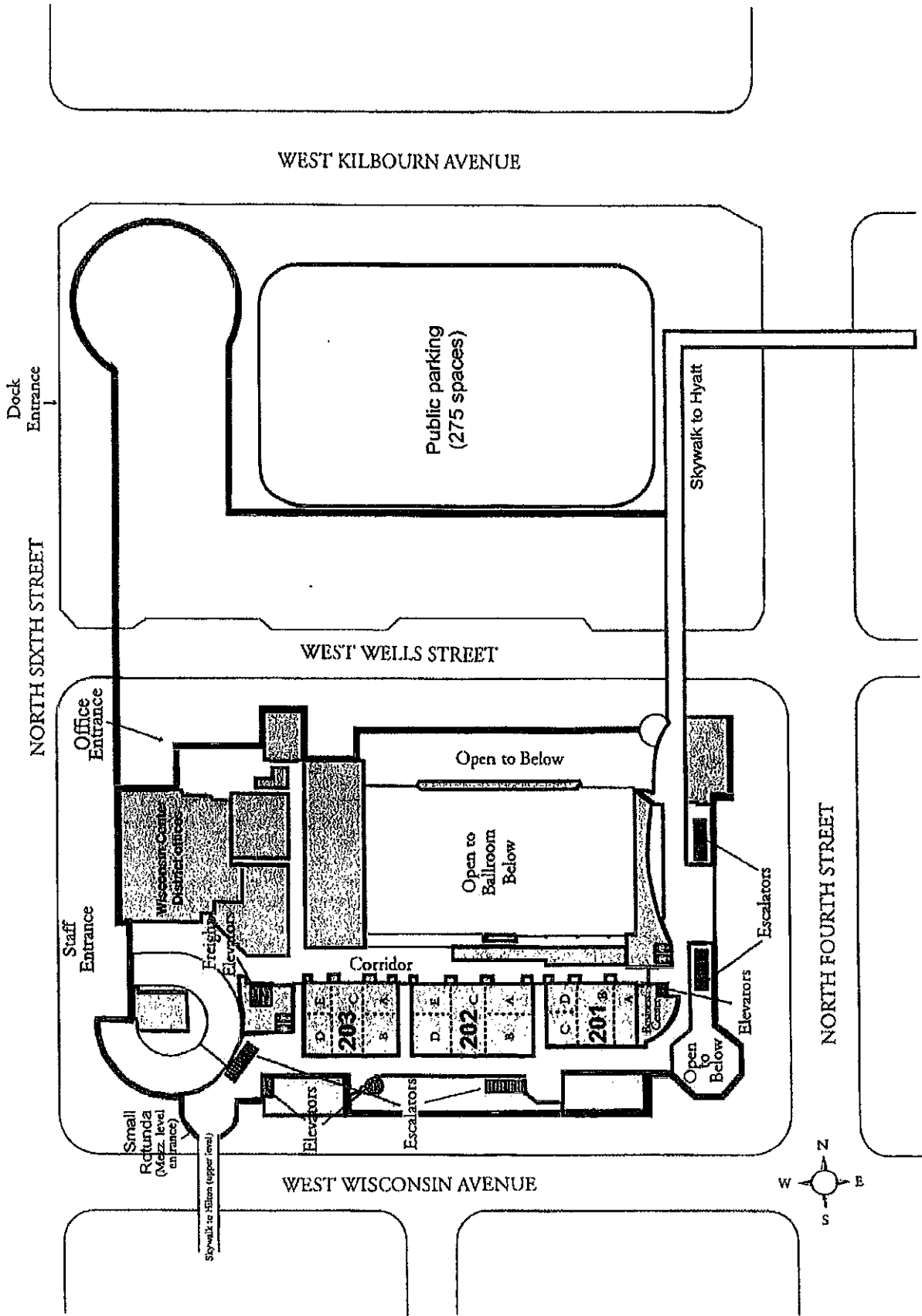
Exhibit B

# WISCONSIN CENTER - STREET LEVEL



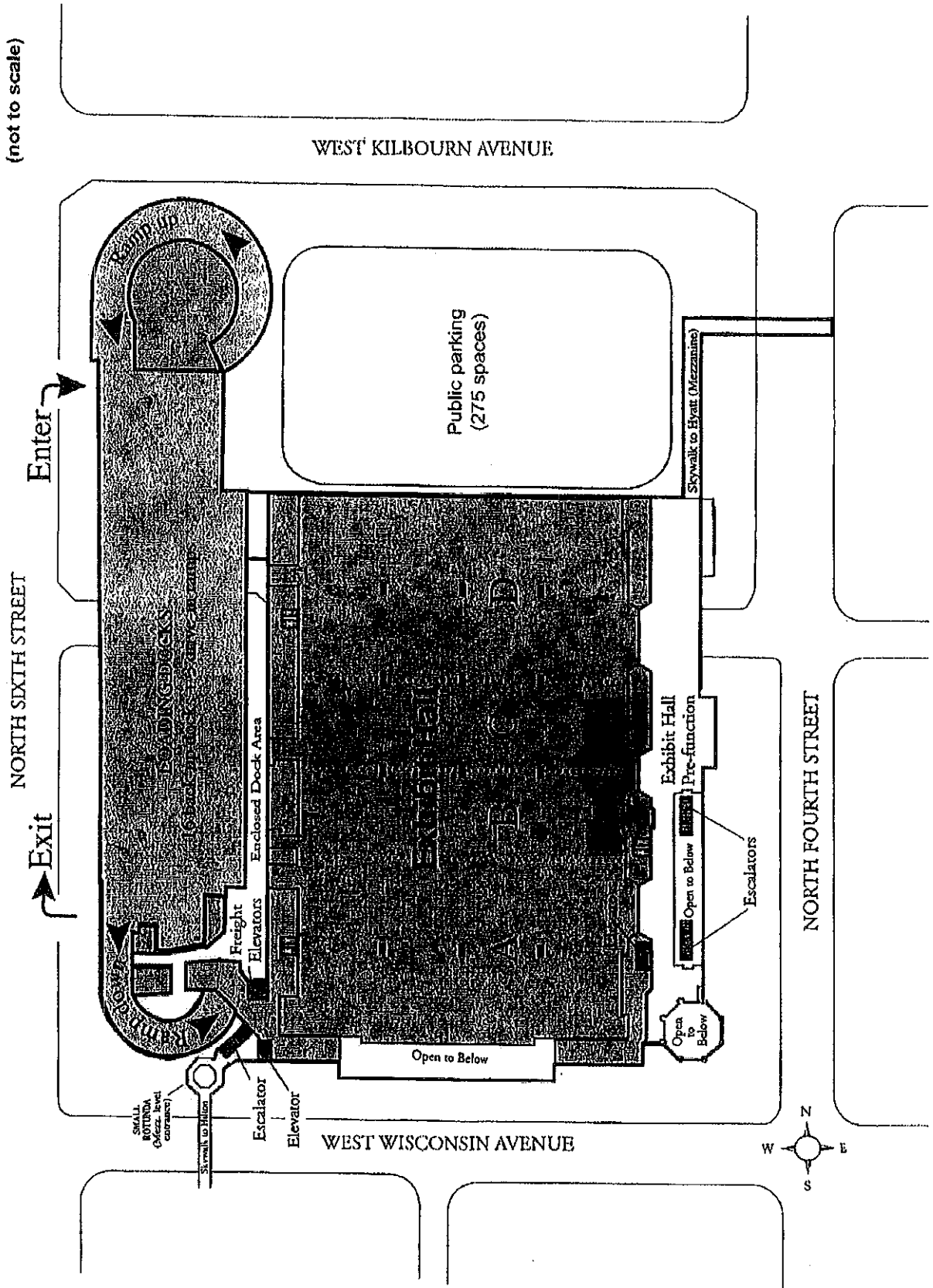
# WISCONSIN CENTER - MEZZANINE LEVEL

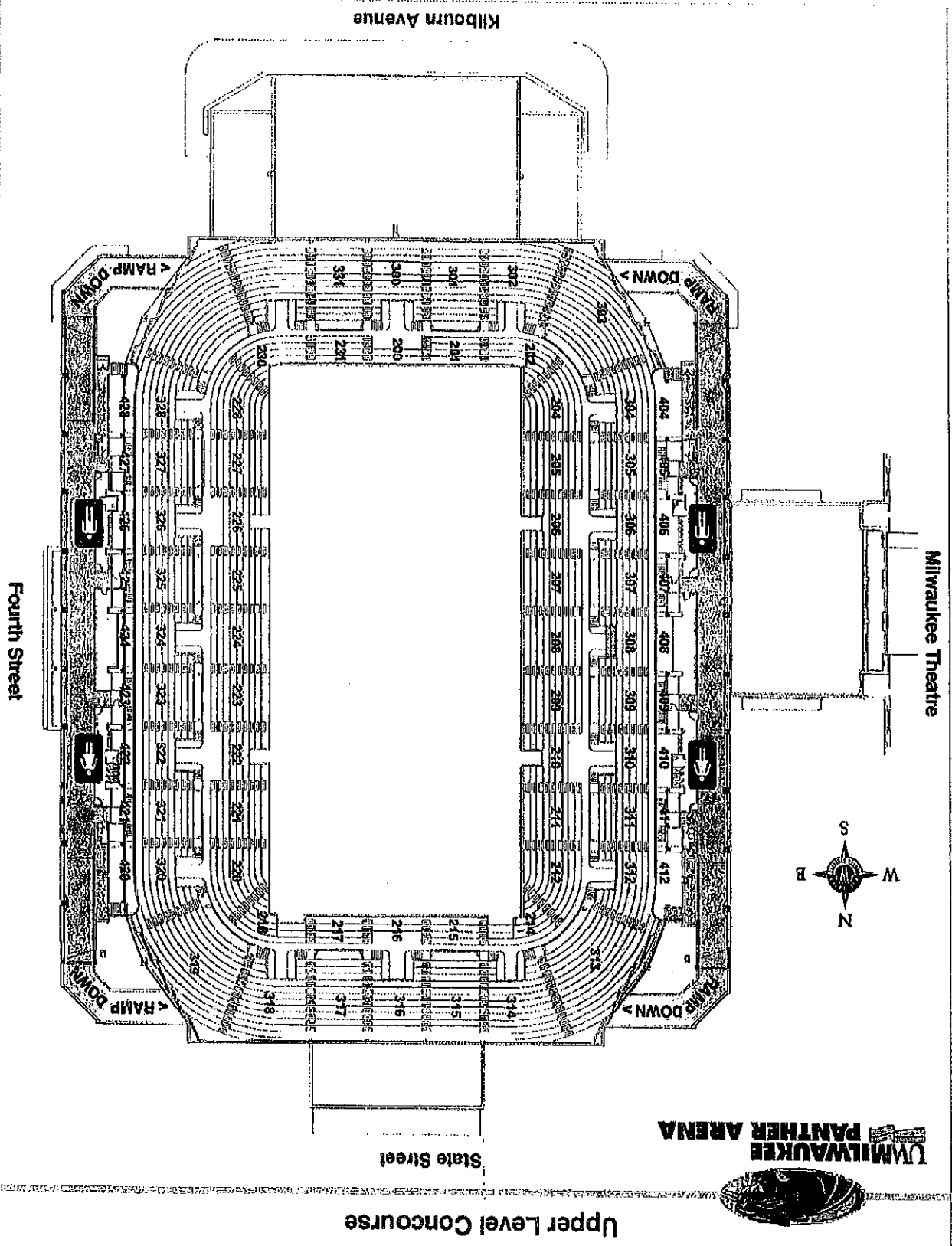
(not to scale)



# WISCONSIN CENTER - UPPER LEVEL

(not to scale)





Kilbourn Avenue

Milwaukee Theatre

Fourth Street



**MILWAUKEE PANTHER ARENA**

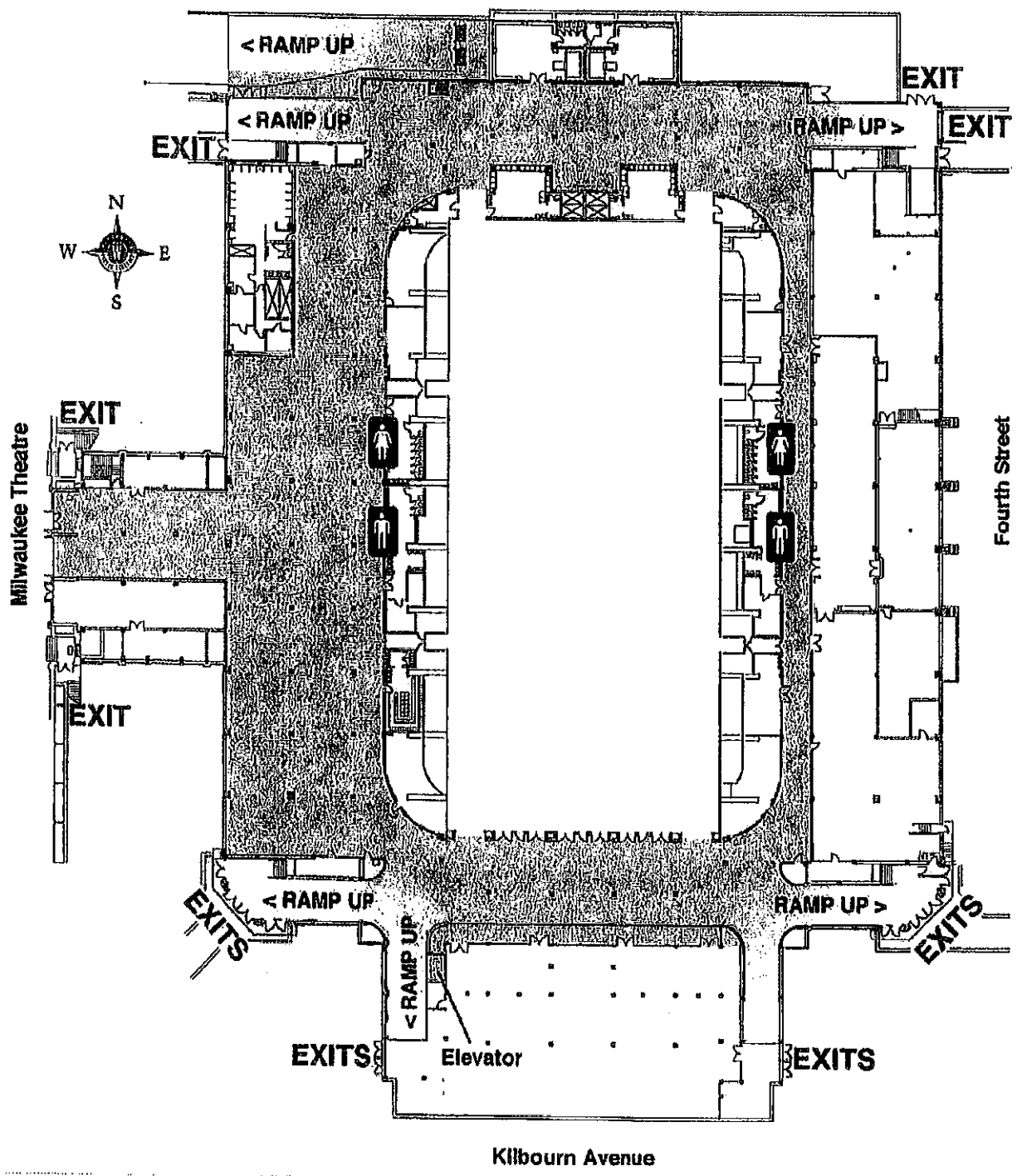


State Street

Upper Level Concourse

# Lower Level Concourse

**UW MILWAUKEE  
PANTHER ARENA**



State Street

Milwaukee Theatre

Fourth Street

Kilbourn Avenue

Elevator

# Main Level Concourse



**MILWAUKEE PANTHER ARENA**

State Street

**EXITS**



Milwaukee Theatre

**EXITS**

**EXITS**

**EXITS**

**EXITS**

**EXITS**

**EXITS**

**EXITS**

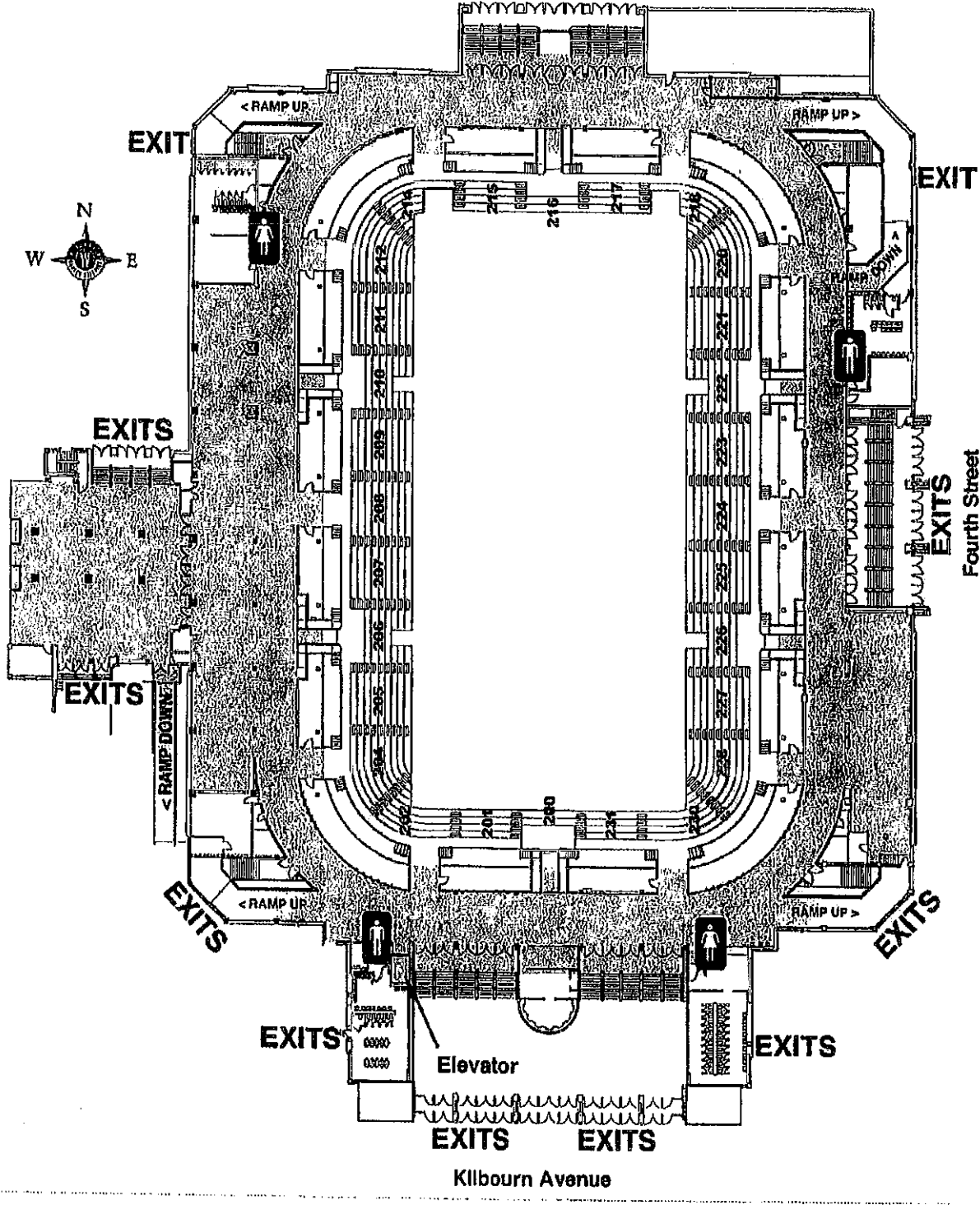
**EXITS**

**EXIT**

**EXITS**

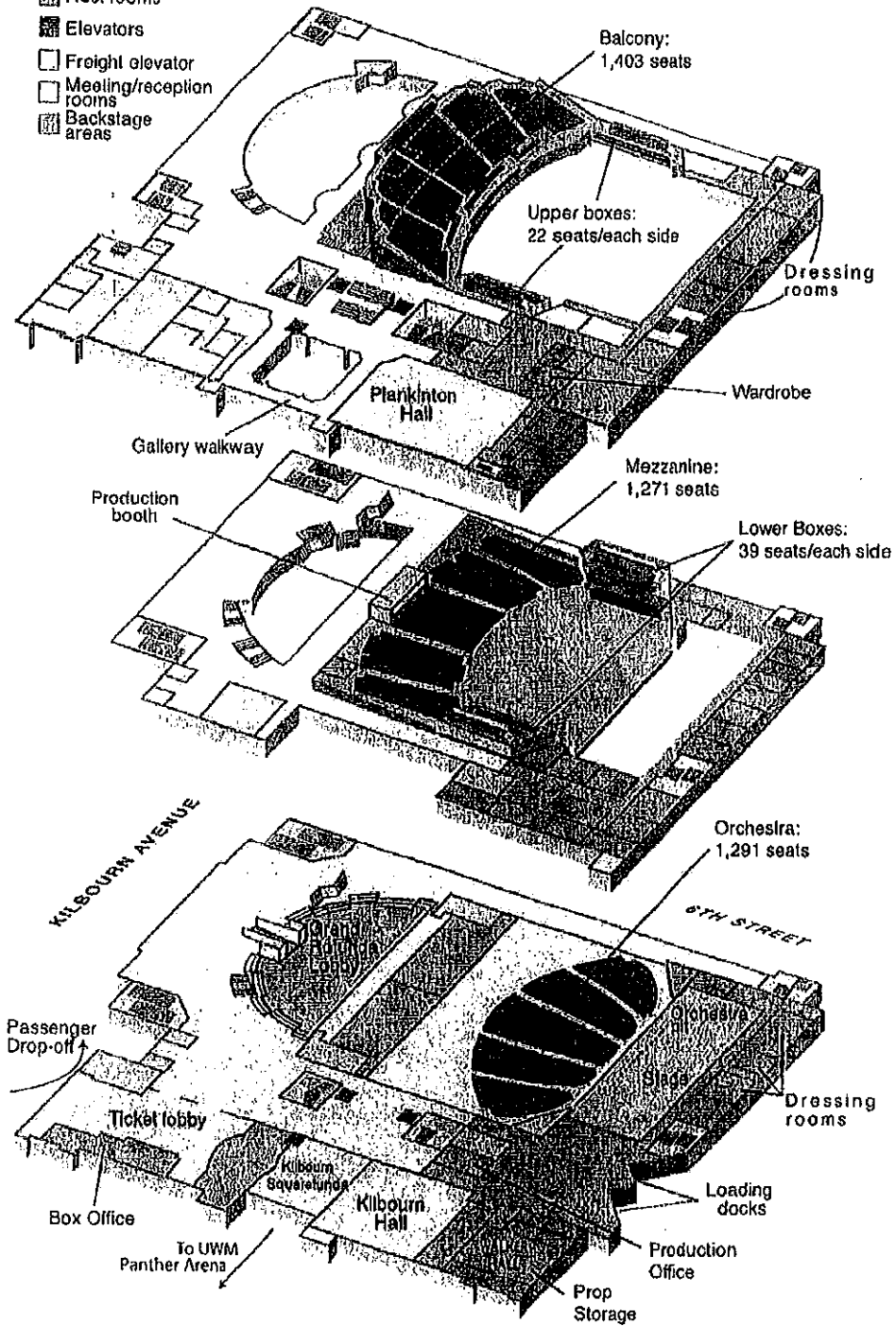
Fourth Street

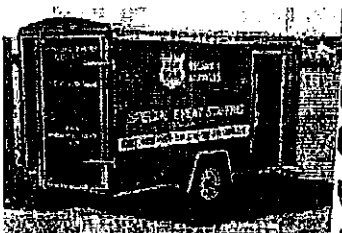
Kilbourn Avenue



# Miller High Life Theatre

- ☐ Stairs
- ▨ Rest rooms
- ▩ Elevators
- Freight elevator
- Meeting/reception rooms
- ▨ Backstage areas





# SERVICE PLAN

*Security Services*



DESIGNED FOR

## Wisconsin Center District

Milwaukee, WI

PRESENTED BY



WE'RE PROUD TO PROTECT.



## SECURITY SERVICES

March 27, 2019

Wisconsin Center District  
555 W. Wells Street  
Milwaukee, WI 53203  
Attn: Karen Hopp, Special Projects Manager

RE: Request for Security Services

Dear Ms. Hopp,

Per Mar Security Services has been a family owned and operated, full-service security company since its inception in 1953. We are currently transitioning to a third generation of ownership, and since the earliest days our philosophy has always been to go beyond the acceptable in the pursuit of excellence. We believe this is the best way to meet the ever-increasing demands of business and industry. Our goal is to set standards today that our competitors will try to emulate tomorrow, and it all starts with a personal touch.

Within our company, the branch office is at the heart of our service structure, where local management is empowered to deliver leadership to both our customers and employees. Mark Schaefer, your local General Manager will be the contact person for this RFP. He is located at 2323 South 109th Street, West Allis, WI, 53227. His phone number is (414) 483-2239 and his email address is [mark.schaefer@permarsecurity.com](mailto:mark.schaefer@permarsecurity.com).

We strive to establish a true partnership with each customer, so we have adopted a proactive approach. We work with customers on an on-going consultative basis, and continually look for ways to improve our service and value. We feel confident that the people who know us best, our customers and our employees, will support our claim of consistently demonstrating a commitment to quality.

Thank you for the opportunity to present our company to you and how we may best be situated to meet your needs as a vendor partner. We look forward to providing Wisconsin Center District with its protection needs in the future.

Sincerely,

Brad Duffy  
President/Managing Director  
Security Officer Division

Mark Schaefer  
General Manager  
Milwaukee Branch Office





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## ***Preface***

Below is your single point of contact. This dedicated professional will remain with you throughout the duration of our partnership to ensure a consistent smooth running security program.

 <b>PER MAR</b> SECURITY SERVICES	<b>Mark Schaefer</b> <i>General Manager</i>
	mark.schaefer@permarsecurity.com P: (414) 483-2239 C: (414) 345-7027
	2323 South 109th Street West Allis, WI 53227 permarsecurity.com

## ***Expiration of Proposal***

This proposal for Security Officer Services is submitted to Wisconsin Center District by Per Mar Security Services on Wednesday, March 27th, 2019, and will remain valid for a period of 60 days from date of submission.

## ***Statement of Confidentiality***

All information contained in this document is proprietary to Per Mar Security Services and is submitted to Wisconsin Center District with the understanding that it will be held in the strictest confidence and will not be disclosed, disseminated, duplicated or used, in whole or in part, for any purpose other than the evaluation of Wisconsin Center District's employees, associates and/or agents.

## ***Equal Employment Opportunity Statement***

Per Mar Security Services is an Equal Opportunity Employer pledged not to discriminate in employment on the basis of race, religion, sex, national origin, non-job related medical condition or handicap, marital or veteran status or age. Pronouns used in this proposal are gender neutral. Specifically, the pronouns he, she, him, and her are intended to describe both male and female applicants and employees.





## 3.0 Proposal Requirements

### 3.1 Cover Letter

The Proposer's cover letter will identify the name, address, telephone number, facsimile number (if any), email address and contact person for the Proposer.

Please see our cover letter which is located as the second page of this proposal.

### 3.2 Table of Contents

The Proposal Table of Contents will conform to the titles and numeric sequence of this Section 3.0.

Please see our table of contents which is located as the third page of this proposal.

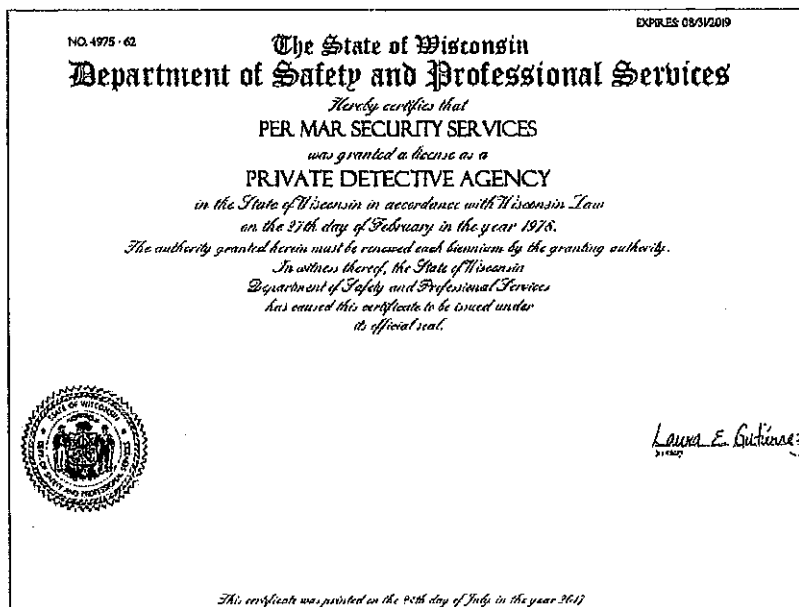
### 3.3 Statement of Eligibility

The Proposer will demonstrate that it meets the Minimum Eligibility Requirements set forth in Section 1.4 of this RFP.

In review of the Minimum Eligibility Requirements from Section 1.4, we have responded below to each of these items:

#### 1.4.1 Licensed to do business in the State of Wisconsin.

Per Mar Security Services is licensed through the State of Wisconsin's Department of Safety and Professional Services. Our license number is 4975-62. A copy of our current license is below.



*1.4.2 Ability to provide professional advice and management services.*

We are a full service security company and have a complement of experts that Wisconsin Center District can call upon to provide security direction and advice in a number of different areas.

*1.4.3 Previous experience in providing of a type consistent with the Purpose and Scope of Services set forth in Section 2.0 of this RFP.*

We have decades of experience in providing services similar in scope to the Wisconsin Center District.

*1.4.4 Evidence of professional liability insurance with a minimum limit of \$5,000,000 per claim and in the aggregate and list the District as additionally insured.*

We can fully meet your insurance requirements. Please see a copy of our sample certificate of insurance in the Attachments section at the end of this proposal.

*1.4.5 At least five (5) years' experience with providing similar services for other organizations.*

We have been providing this service since our first security officer client Servus Rubber in 1959. We have provided event services as early as the University of Iowa in 1965.

*1.4.6 At least five (5) current clients to which provider supplies services similar to the Security Services. Provide organization name, address and contact.*

We will provide the five required references and have them listed in response to 3.6.3 under Qualifications and Prior Experience.

### **3.4 Executive Summary**

The Proposer will prepare an executive summary, which will contain a commitment by the Proposer to provide the Security Services in accordance with the Purpose and Scope of Work, as described in Section 2.0 of this RFP (the "Executive Summary"). The Executive Summary will include a statement of the Proposer's understanding and general approach toward providing the services or installation.

We thank you for your interest; we value this opportunity to present the unique strengths and qualifications Per Mar Security Services offers to Wisconsin Center District. For over 65 years, we have provided quality unarmed and armed security officers across a wide range of situations in almost every industry: businesses from small to Fortune 500, event venues, healthcare facilities, retail and financial institutions, manufacturing and industrial sites, governmental agencies and residential communities.

We have been a family owned and operated, full-service security company since our inception in 1953. We are currently transitioning to a third generation of ownership, and since the earliest days our philosophy has always been to go beyond the acceptable in the pursuit of excellence. We believe this is the best way to meet the ever-increasing demands of business and industry. Our goal is to set standards today that our competitors will try to emulate tomorrow, and it all starts with a personal touch.

Within our company, the branch office is at the heart of our service structure, where local management is empowered to deliver leadership to both our customers and employees. We believe you will experience this first hand with Mark Schafer leading the way at our Milwaukee branch office. Our corporate infrastructure is designed to accommodate reasonable growth at the branch level without affecting the consistently high quality service that our customers have come to expect. Our company works as a team; we are a family, wherever we are, the goal remains the same.





We strive to establish a true partnership with each customer, so we have adopted a proactive approach. We work with customers on an on-going consultative basis, and continually look for ways to improve our service and value. We feel confident that the people who know us best, our customers and our employees, will support our claim of consistently demonstrating a commitment to quality. We believe we understand what it takes to service the Wisconsin Center District venues and look to be your preferred security provider.

### **3.5 Proposer Identity and Structure**

Submit a description of the legal structure of each entity, which comprises the Proposer. This will include identification of each participating principal member, partner or co-venture, specifically noting any which are certified MBE's and/or WBE's as required under Exhibit A of the Contract. Proposals submitted by joint ventures or associations must include one of the following: (i) a copy of the joint venture agreement with original signatures, or (ii) a memorandum of agreement, which fully discloses the relationship between entities of the joint venture. Exclusive arrangements with subcontractors for proposal submissions are discouraged.

Per Mar Security & Research Corp. dba Per Mar Security Services is an S Corporation and will be the principle and only member providing service to the Wisconsin Centre District. Our company was incorporated in the State of Iowa in October 1953.

### **3.6 Qualifications and Prior Experience**

For each entity, which comprises the Proposer, provide background materials and information as to its qualifications and technical experience regarding performed for other clients. This should include:

3.6.1 Client name, business address and email address.

Per Mar Security Services  
2323 South 109th Street  
West Allis, WI 53227

Mark Schaefer  
General Manager  
mark.schaefer@permarsecurity.com  
(414) 483-2239

3.6.2 Description of services provided by the Proposer and amount of years serviced.

There is a good reason we say we are **One Company...One Call...One Solution!**®. We have a wide-range of security and safety products and solutions we have been providing for over 60 years including:

#### **Security Officer Solutions**

- Permanent Security Officers
- Temporary Security Officers
- Event Management Services
- Mobile Patrol Services
- Alarm Response Officers
- Emergency Response

#### **Investigative Solutions**

- Background Investigations
- Business Fraud Investigations
- Pre-Employment Screening
- Secret Shopper
- Seminars
- Video Surveillance

#### **Electronic Security Solutions**

- Access Control
- Alarm Monitoring
- Burglar & Fire Alarm Systems
- Camera Systems
- Central Station Online
- Elevator Communications
- Environmental Monitoring
- Fire Alarm Inspections
- GSM Radio Service
- Home Automation
- ID Badging Systems
- Medical Alert Devices
- Remote Vision
- Total Connect
- Verified Response
- Video Monitoring
- Videofied
- Wireless HD Cameras



3.6.3 Project reference(s), current name, address, telephone, email address and facsimile numbers.

It is important we make note of any current partnerships we have that are similar in size, scope, industry, or geography to your location. We ask that you contact any of the below companies to verify our services. If you require additional references beyond those noted we can provide upon request.

Company: **Pabst Theater Group**  
Address: 144 East Wells Street  
Milwaukee, WI 53202  
  
Contact: Paul Smaxwill  
Title: Operations Manager  
Phone: (414) 286-5426  
Email: psmaxwill@ptglive.com



Company: **We Energies**  
Address: 231 W. Michigan Street  
Milwaukee, WI 53203  
  
Contact: Bryan Rodman  
Title: Principal Security Consultant  
Phone: (414) 221-2897  
Email: bryan.rodman@we-energies.com



Company: **DLC Management Corporation**  
Address: **Midtown Center**  
5700 West Capitol Drive  
Milwaukee, WI 53209  
  
Contact: Mark Snider  
Title: Property Manager  
Phone: (708) 738-8862  
Email: msnider@dlcmgmt.com



Company: **Wisconsin Restaurant Association**  
Address: **Midwest Food Expo**  
2801 Fish Hatchery Road  
Madison, WI 53713  
  
Contact: Ryan Petterson  
Title: Supplier Services - WRA  
Phone: (608) 270-9950  
Email: rpettersen@wirerestaurant.org



Company: **Washington County Fair**  
Address: 3000 Pleasant Valley Road  
West Bend, WI 53095  
  
Contact: Kelle Boone  
Title: Executive Director  
Phone: (262) 677-5060 ext. 1224  
Email: kboone@wcfairpark.com



3.6.4 General statement of experience. Provide a verifiable statement of the Proposer's experience in providing this type services and installation. Telephone numbers and email addresses of references for each project listed must be provided.

Per Mar Security Services has been providing Security Officer Services since 1959 with our first 'guard' customer Servus Rubber. We have also been providing Event Security Services since 1965 with our first 'event' customer the University of Iowa. We have provided these services to thousands of customers throughout the years.

From a local standpoint, we opened in the Milwaukee area in 1999. We provide Security Officer Services, both permanent and temporary, to many customers in the area. In addition, in terms of Event Security Services, we have a very well established program. Below are the area events and locations we have provided staffing for events directly out of our Milwaukee branch office along with the number of years servicing in parenthesis.

- Pabst Theater Group (14)
- Milwaukee Film Festival (3)
- Bastille Days (5)
- Washington County Fair (3)
- Jazz in the Park (8)
- Ozaukee County Fair (2)
- Zoo a la Carte (2)
- Jazz on the Vine (3)
- St Gregory the Great Festival (6)
- St. Rita's Festival (4)
- St John the Evangelist Festival (6)
- UW Milwaukee Athletics & Events (3)
- Kilbourn City Live (3)
- Dells on Tap (2)
- Automation (2)
- Racine Festival & Memorial Halls (8)
- 88Nine Radio Milwaukee (2)
- Milwaukee Christmas Lights – PMP (3)
- Mitten's Fest (5)
- Burnhearts Summer Festival (4)
- Great Lakes Hemophilia Fundraiser (3)
- Brewfest Racine (2)
- Midwest Food Expo (3)
- WMSE Art & Music Fair (2)
- Building Advantage Job Fair (4)
- Newaukee Night Market (3)
- Urban Island Beach Party (3)
- Firkin Fest (6)
- Holy Angels West Bend (2)
- St John Nepomuk Festival (8)
- Action in Jackson (6)
- Grand Slam Charity Jam (3)
- Camp Hometown Heroes (3)
- Summer Soulstice Street Fair (2)
- Ashippun Fireman's Picnic (6)
- Our Lady of Lourdes Festival (3)
- Museum of Art West Bend (2)
- Watertown's Riverfest (3)
- Rockfest @ WCF (1)
- Country Live @ WCF (2)
- River Challenge (3)
- Bay View Bash (3)
- Brady Street Days (3)
- Goodkind Festival (2)
- Fresh Coast Classic Basketball (2)
- Oktoberfest (2)
- Divine Mercy FunFest (3)
- WMSE Backyard BBQ (3)
- Boswell Books Events (2)
- Shorewood High School Football (3)

We would be happy to provide some contacts as well for any of these requested, however we do have some direct references listed in the previous section.

3.6.5 Financial Statements. The Proposer's last three fiscal years' annual financial statements certified by a nationally or regionally recognized firm of Certified Public Accountants.

Please see a copy of our financial statements in the Attachments section at the end of this proposal.

3.6.6 Additional Resources. The Proposer may, at its discretion, describe other resources or special qualifications, which are relevant to providing professional services.

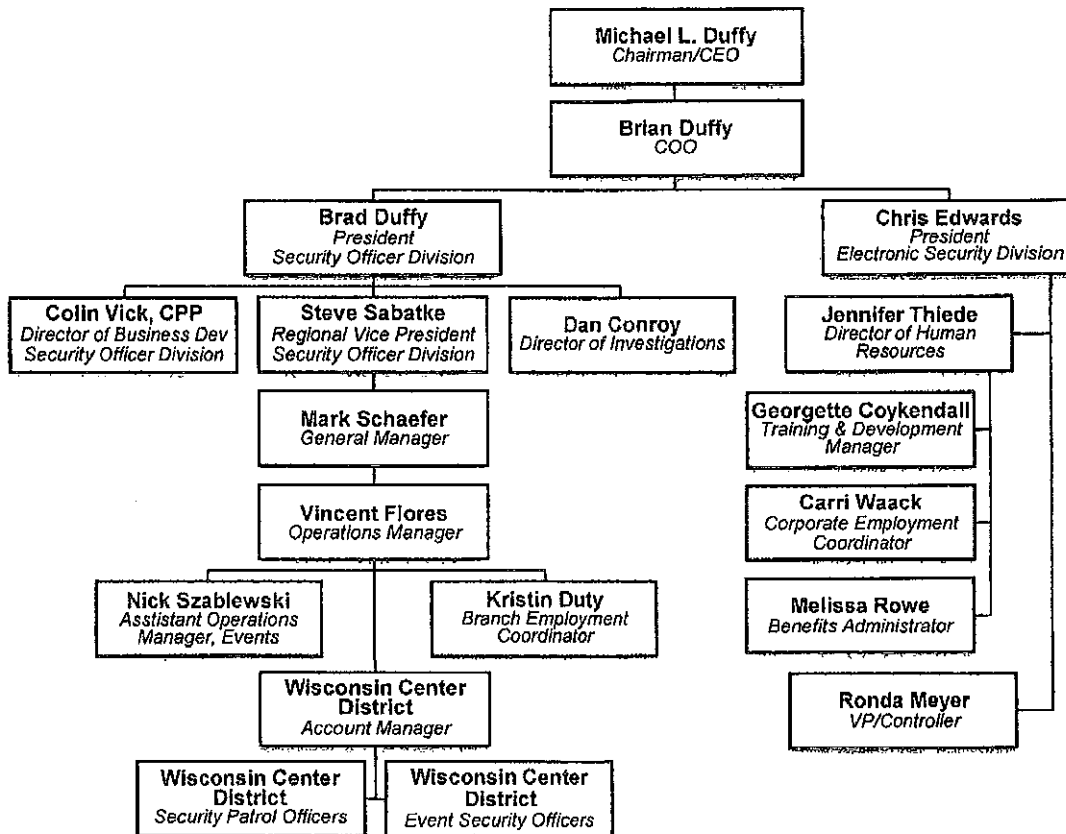
As with any security company we have access to resources both internally and externally that could be of use to Wisconsin Center District in the future.



### 3.7 Key Personnel and Qualifications

Provide an organizational chart with a description of the responsibilities for key personnel. Provide resumes for all key personnel to be assigned for the project. The District reserves the right to approve all personnel assigned to the Wisconsin Center District. Furthermore, the District reserves the right to require the removal of any personnel.

Please see the following organizational charge for how our local team plus our corporate support team are related to the Wisconsin Center District.



We have key personnel from both a branch and a corporate level we have identified that will have a key role in the management and oversight of the Wisconsin Center District account. We have included resumes for these individuals in the Attachments section at the end of this proposals. This includes resumes for the following people:

#### Local Branch Management

- Mark Schaefer, General Manager
- Vincent Flores, Operations Manager
- Nick Szablewski, Assistant Operations Manager Events
- Kristin Duty, Employment Coordinator

#### Executive Leadership

- Brad Duffy, President/Managing Director
- Steve Sabatke, Regional Vice President



### **3.8 Organizational Structure and Responsibilities**

Provide a detailed description of Proposer's approach to the assignment, including key personnel, their titles and names, and staffing levels in accordance with the Purpose and Scope of the project. Identify all portions of the Services, which the Proposer intends to perform with its own employees. Indicate local availability of key personnel throughout the duration of the assignment.

#### **SUPPORT TEAM**

As part of our organization structure, below is a snapshot of the team responsible for service and the different areas they will be responsible for the Wisconsin Center District account.

- **Steve Sabatke**  
REGIONAL VICE PRESIDENT  
  
Coordinate and allocate regional and corporate resources such as additional security or event personnel from other Wisconsin branch offices (e.g. Madison, Green Bay, Wausau, and Eau Claire). Approval for large expenditures in support of Wisconsin Center District.
- **Mark Schaefer**  
GENERAL MANAGER  
  
Allocation of local resources, Client engagement, contract compliance, branch office oversight and ensure the dedicated WCD Account Manager is receiving the support necessary to meet Wisconsin Center District's expectations. Engage Regional Vice President when necessary.
- **Kristin Duty**  
BRANCH EMPLOYMENT COORDINATOR  
  
Recruit and hire local security and event staff through online recruitment sources, job fairs, outreach programs, job centers, employee referral program, colleges & universities, social media, etc. Kristin would communicate with our dedicated Account Manager regarding permanent staffing needs, as well as staffing for upcoming events and ensure staff levels are met. Kristin would also assist with employee issues involving FMLA, workplace injuries, ordering supplies, uniforms, etc.
- **Vince Flores**  
OPERATIONS MANAGER  
  
Oversee payroll and TeamTime for both the Security and Event staff, assist the Account Manager with scheduling for Security Officers, conduct classroom training, quality assurance reviews of SecurePatrol reports, and allocate Flex Officers to fill schedule gaps.
- **Nick Szablewski**  
ASSISTANT OPERATIONS MANAGER, EVENTS  
  
Directly responsible for all Special Events throughout southeast Wisconsin with direct oversight of the WCD Account Manager. Assist the Account Manager with scheduling, review WhenToWork app, develop WCD specific policies and procedures, mentoring and training,
- **Jaclyn Kearney**  
CORPORATE PAYROLL/BILLING SPECIALIST  
  
Based at Per Mar Centre, our corporate headquarters, in Davenport, Iowa, Jaclyn will work directly with the local office staff and the Account Manager to ensure payroll is processed accurately and timely. Jaclyn oversees the invoicing for each client in Milwaukee and would work directly to ensure the regular Security Patrol and Event Security invoicing is accurate along with the invoicing for WCD's numerous shows and events.



## **ACCOUNT MANAGER**

In addition to our local management team and administrative staff detailed above, Per Mar Security Services is proposing the addition of a dedicated Account Manager to the Wisconsin Center District project to directly oversee both the permanent security staff and event staff.

The scope of work as defined in the RFP with the combined permanent security and event staff as well as placing all services under one contractor for the first time is a challenging undertaking. We believe that the dedicated Account Manager position is necessary for the success of the program. This manager would reside within the Wisconsin Center District offices and work directly with your management on a day to day basis as well as our local branch management team to ensure seamless consistent transition of your needs into action.

We will consider any existing personnel as potential candidates as well as candidates outside of our organization for this position in order to find the best fit for Wisconsin Center District. Ideally, we will be looking for a person that has:

- 10-15 years' relevant experience within the security/event industry or law enforcement
- 5-10 years relevant supervisory/management experience
- Has or will obtain certification and/or membership with:
  - National Center for Spectator Sports Safety and Security
    - Certified Sport Security Professional
  - International Association of Venue Managers
    - Certified Venue Professional

In addition, we will supply the Account Manager with a laptop, smartphone, copier/scanner/printer, and a parking pass.

The Account Manager will be directly supported by Vince Flores, the Milwaukee Operations Manager for issues pertaining to the Security Patrol staff and by Nick Szablewski, the Milwaukee Assistant Operations Manager Events for issues pertaining to Event Security as well as Jaclyn Kearney, our Corporate Payroll/Billing Specialist. This structure ensures that the Account Manager has direct access to local and corporate management personnel that can best support Wisconsin Center District.

The Account Manager's responsibilities would include:

- Daily communication with Wisconsin Center District management: staffing needs/changes for upcoming events, resolution of any concerns
- Oversight of the Security Patrol staff, review of daily activity, incidents, etc. and ensure contract compliance
- Oversight of the Event staff to ensure contract compliance
- Resolution of employee issues
- Scheduling for both the security and event staff
- Payroll/Billing reconciliation
- Conduct and document on-site training
- Schedule and assist with equipment maintenance: radios, wands, magnetometers
- Schedule and oversee uniform cleaning: arrange for the pick-up and delivery of
- Maintain supplies for staff and place supply orders through the local branch office for: batteries, latex gloves, cleaning supplies, flashlights, etc.

We suggest that Wisconsin Center District reach out to Ted Thompson, Per Mar's Project Manager assigned to our local WEC Energy Group account, parent company of We Energies, as a testament to the success of the Project Manager position. Ted is deeply imbedded within the WEC Energy Group's security





department and provides a critical link between our Client and local and regional Per Mar branches. Ted's role, skill set, and experience have been vital to the success of Per Mar's support to WEC Energy Group. Ted joined Per Mar Security Services in early 2018 with over 9+ years of security experience as the manager of another local security company. Ted will provide an honest assessment of how he sees his relationship with the local branch office, the support he receives, and how this position would be key to the success of Wisconsin Center District's security and event staff program.

Ted Thompson  
Executive Account Manager  
Per Mar Security Services &  
WEC Energy Group  
Office: (414)221-2634  
Cell: (414)403-0390  
Email: Ted.Thompson@we-energies.com

### **3.9 Work Plan Outline**

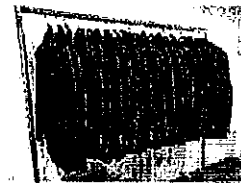
Provide a detailed Work Plan Outline defining your proposed scope of services, capability, and estimated level of effort, methodology and strategy for providing each of the identified in Section 2.0 of this RFP (the "Work Plan Outline"). The Proposer is encouraged to elaborate upon the stated requirements, indicating its experience or individual skills, overall project approach and methodology, to create a draft outline of the complete project.

Centered on the dedicated Account Manager and supported by Per Mar's experienced local management team, Per Mar Security Services will provide the necessary vetted, trained, uniformed and supervised staff, equipment, training and ongoing support to ensure Wisconsin Center District's requirements are continuously met, its venues remain secure and its patrons and artists enjoy their experience.

We will utilize existing key partnerships with local vendors along with state-of-the-art technology to maximize our workforce and optimize efficiencies to provide Wisconsin Center District with the best security and event staff available today and years still to come. A few of these important aspects of service plan are mentioned below.



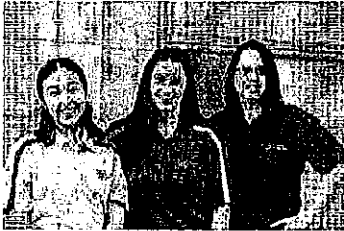
A professional appearance of the security and event staff is an important aspect of their success. First and second impressions count. Our local branch office maintains a large inventory of new uniforms for both the female and male Security and Event staff assigned to Wisconsin Center District. Our relationship with Avenue Fabricare ensures that our staff will have access to professionally dry cleaned uniforms. This is especially important for high profile events or posts where the security or event staff are required to wear dress slacks and shirts with a sport coat. Avenue Fabricare has two downtown locations and will pick up and drop off directly to Wisconsin Center District. We will maintain an adequate number of properly cleaned and tailored men's and women's sport coats at Wisconsin Center District.



Our uniforms for its security and event staff are designed to present a professional appearance, wear well, be comfortable in a variety of environments and enhance our staff's ability to perform their job duties. Unlike most of our competitors, we do not charge for or require a deposit for the uniform items we issue to our employees. We issue the appropriate quantity and style for each employees' work location. Additional uniforms are always available to replace worn or damaged items at no expense to our employee.

Per Mar security officer uniforms are designed to project an appropriate level of authority yet also present a professional appearance. We provide short and long sleeve shirts, sweaters, windbreakers, winter parkas as well as knit and baseball style caps.





Our Event Security uniforms are designed to stand out and be instantly recognizable in either indoor or outdoor venues and within large crowds. We issue short sleeve polo style shirts, full zipper front fleece jackets, windbreakers and parkas. Event staff are also issued baseball or knit caps. We utilize a color scheme to help identify supervisory personnel within our Special Events program. Yellow/Green represents nonsupervisory personnel, Grey represents a "Lead" staff and Red represents a Supervisor. All special event uniforms come in each color.

All employees are required to strictly follow our Appearance and Grooming Standards. These standards are presented during an employees' initial classroom training, then again during their On-the-Job training and throughout their employment.

The following will govern appearance of our employees' uniforms at the Wisconsin Center District:

- Uniform shirt and pants will be neat, clean, and professional looking.
- The uniform is worn to and from work and on duty only.
- Only issued uniforms are authorized for wear on duty.
- The badge goes over left breast pocket.
- The nametag goes over right breast pocket.
- Ties must be worn with long-sleeve shirts at all times.
- Ties are not required with short-sleeve shirts.

#### ***Officer and Event Personnel Appearance***

The uniform itself is an important component of the overall look, but there are other factors that will create the complete professional image. Below is a summary of our appearance and grooming standards:

- Hair styles and colors may not be in extreme and should be neatly styled.
- Shaved hair designs or tails are not allowed.
- Moustaches are allowed but it is to be kept trimmed above the corners of the mouth.
- The use of jewelry is to be kept to a minimum and should not be distracting.
- Nails must be clean and neatly trimmed.
- Women should use only subtle nail polish colors.
- Earrings may not be worn by men.
- Earrings that dangle or are inconsistent with business attire are not allowed.
- Nose piercing, tongue piercing, facial piercing or any visible piercing is not permitted.
- Necklaces may not be worn in such a manner that they hang over a necktie.
- Non-prescription sunglasses are not allowed to be worn in indoor work areas.
- Sunglasses may be worn in outdoor work areas during daylight hours.
- Tattoos **may not be visible** on the arms, neck, face or throat.
- Employees must wear clothing appropriate to conceal tattoos in these areas.



SERVICE PLAN FOR  
**Security Officer Services**

DESIGNED FOR  
**Wisconsin Center District**

Per Mar Security Services has a partnership with General Communications that is decades long. "GenCom" is our exclusive provider of 2-way radio communication systems including, portable and hand held systems, batteries, chargers, charging racks, programming and maintenance.



Whether it's the recent purchase of 40 new two way radios to support the Pabst Theater Group or renting 5 or 100 for events including the Cross Fit Games or the Harley Davidson 115<sup>th</sup> Anniversary, Per Mar and Wisconsin Center District can count on quality communications equipment from General Communications. **We have included the purchase of 20 new two way radios within our hourly rates to support the Event Security Staff.** These radios will be maintained on site at Wisconsin Center District utilizing custom built, secure radio cabinets



Per Mar Security Services has a local partnership with Advanced Professional Healthcare Education LLC., or APHE to provide American Heart Association (AHA) courses. APHE staff are experienced trainers utilizing state of the art equipment and up-to-date techniques to instruct CPR (adult and child), AED, and First Aid classes. APHE staff are very flexible with their course times and are able to hold classes at their local office in Wauwatosa or in most cases, at Per Mar's training center at our local office or Client sites during the week, on evenings and weekends. This partnership means we will be able to keep its staff fully certified and compliant with WCD's CPR/AED/First Aid requirements.



### **STAFFING**

Per Mar Security Services operations in Milwaukee go back decades. We have an established branch office in West Allis that provides and supports security and event staff Clients across southeastern Wisconsin. Our Clients include: Universities, hospitals, utility companies, theaters, sports centers, manufactures, warehouses, retail outlets, government buildings, fairs and festivals, alarm and patrol services as well as emergency response. In Milwaukee we have accounts as small as 1 Officer for 2 hours per week at the Medical College of Wisconsin or as large as 2,000 hours per week and 60 Officers at WE Energies.

A key component to our success with both our security and event programs is our ability to attract the best talent in the area and retain this staff year over year. Per Mar's reputation in the Milwaukee market makes us the company of choice for high caliber event and security personnel. Our interview and screening procedures ensure that we are assigning only the most vetted and reliable staff within your facilities. When all of this is paired with extensive classroom, on-site and ongoing instructor led training as well as professional supervision, Wisconsin Center District is assured that it has an experienced and capable security and event staff for its venues.

Key aspects of our Staffing plan for Wisconsin Center District include:

- Recruiting from numerous established and reliable sources to ensure a constant flow of applicants.
- In person interviews for all security and event staff applicants.
- A layered application and screening process that puts Per Mar's Corporate Human Resources Department in charge of final screening.
- Extensive background investigation for ALL employee regardless of whether they will be a security officer or event staff, to include statewide and county criminal records check, social security number trace, employment verification, education verification, and a national sex offender registry.
- Each applicant must review and acknowledge a "Site Profile" which details the work environment (indoors, outdoors, loud, hot, etc.) type and duration of physical activity (walking 65%, stairs 10%, etc.) and job duties. This acknowledgement assists in placing the right people at the right job.





- sites. This is important to WCD's security portion of the project as these officers must walk for extended periods of time both inside and outdoors as well and traverse numerous flights of stairs during their shift.
- Review and acknowledgement of our standards and policies.
  - Those employees who require a State of Wisconsin Private Security License, will receive instructions on completing the application and where to go to get their fingerprints taken. Kristin Duty will then submit the employees' application along with payment to the Wisconsin Department of Safety and Professional Services (DSPS).
  - Security Officer candidates are not allowed to move past this phase until their Security License has been granted by DSPS and the active license has been verified by Per Mar's General Manager, Mark Schaefer.

Once the applicant has been thoroughly vetted and acknowledges their understanding and agreement with the work duties and expectations, they are formally hired and scheduled for classroom training.

### **TRAINING**

Training is taken very seriously by Per Mar. The classroom environment provides the best conditions to instill the proper methods and standards that our security and event staff must adhere to once they arrive at WCD. During their training they are evaluated on their interaction individually and as a group and they must complete a final exam. Per Mar's classroom, site and on-going training for security and event personnel is explained in detail in Attachments "Training Plan".

At the conclusion of the employee's training they are issued their uniforms and instructed on the proper care and use of these items. They are also given their date for on-site training at Wisconsin Center District. Employees are then shown how to download and set up their accounts with Per Mar's TeamTime, eHub and WhenToWork applications. These software tools are important aspects of Per Mar's scheduling, payroll and billing process and enhance Per Mar's partnership with Wisconsin Center District.

### **SCHEDULING**



Per Mar employees utilize TeamTime and eHub to receive their schedules, "Clock-in and Clock-out" from their job assignments, review their paystubs, submit vacation requests, update their contract information and more. At Wisconsin Center District the TeamTime check-in/out process is further simplified by the use of biometric readers to record an employees' arrival and departure times.

The biometric reads are immediately logged into Per Mar's payroll and billing software, WinTeam. This process eliminates the outdated paper sign-in/out sheets, significantly reduces the time to process payroll and invoices and reduces errors.



Per Mar's Special Events personnel are scheduled for their assignments using the WhenToWork App. This app allows the Wisconsin Center District Account Manager to schedule Wisconsin Center District events 30 days or more in advance once staffing levels are determined. The Account Manager can then assign personnel including supervisors based upon their availability or employees who are best suited for that particular event. The employees will receive an alert on their smart phone. For large events the Account Manager can post multiple opening for a single event and allow the staff to then sign-up on a first come basis. The Account Manager can include detailed notes in the app for each event. The app is scalable to assist with scheduling one event requiring two employees or multiple events on the same evening requiring an unlimited number of staff.





Upon arrival at Wisconsin Center District for their assignment the Per Mar Security Officer will utilize TeamTime by calling from a dedicated phone line to Check-in and then Check-out at the end of their shift. Per Mar Event staff will utilize the TeamTime biometric readers to document their arrival and departure. The Per Mar Account Manager will be able to monitor in real time who is checking in or out and the accuracy of these times compared to Wisconsin Center District's required staffing needs. The Account Manager can then update both payroll and invoices. Accurate invoices can now be generated the evening of events. Per Mar's extensive utilization of TeamTime, Biometrics, eHub and WhenToWork apps, simplifies the scheduling process, reduces the number of emails or phone calls to staff, ensure a consistent message is sent and received by our entire event staff, expedites the payroll and invoicing process and significantly reduces invoicing errors.

### **FLEX OFFICERS AND SHADOWING**

To address instances of call-offs of the Security Patrol Staff, Per Mar will utilize its current staff of On-Call security officers who are cross-trained at numerous facilities. These "Flex Officers" are unique individuals who sign an agreement with Per Mar to be permanently On-Call, train and be proficient at all of our accounts. Flex Officers are compensated at a significantly higher hourly pay rate than the officers. Please note that this additional cost is not passed along to Wisconsin Center District.

To address our Special Events Clients' concerns about meeting full staff levels for their events, Per Mar has taken the unique and successful approach of deliberately over staffing events. Although this is not a new concept, Per Mar takes it a step further by scheduling its new staff as the extras and places them in a "shadowing" function with experienced staff. This enables the new staff to gain valuable experience while at the same time providing a little cushion in the event other staff are unable to make the event. It's easier to send people home than it is to call them in. Per Mar does not charge Wisconsin Center District for personnel in excess of the number of staff requested.

### **CREDENTIALS**

Each staff member will have an identifying credential that will be worn on a lanyard around their neck. Below are some sample mock-ups of how we envision the front of the credential looking, however we would certainly welcome input from the Wisconsin Center District on appearance and setup. The back of the credential will include a list of first aid locations, lost and found, shelter locations, important phone numbers, etc. The credentials for Security Officers and Supervisors will include their photo.





This credential has several functions, including:

1. Allowing for an additional level of professionalism and authority for the staff.
2. Identifying the card wearer as a Per Mar Employee with a number so a patron can identify the employee if necessary.
3. Providing the employee with critical emergency information as a quick reference.
4. Provide the employee with answers to frequently asked questions.

### **ARRIVAL VERIFICATION**

Per Mar's use of TeamTime and our 24/7 Dispatch Call Center located in Davenport, Iowa, ensures that a local manager is notified within 15 minutes of a scheduled employee failure to clock-in. TeamTime software sends an automatic alert to the on-duty Dispatchers who are able to review the job site, scheduled employee and their shift as well as their contact information. The Dispatcher will then immediately attempt to contact the employee and the job site to ascertain if the employee is indeed there, but late or they have not arrived. If the employee is not there, the Dispatcher will then follow the prescribed procedure for notifying the local Per Mar supervisor for resolution. The entire situation is documented including the resolution.

3.9.1 Policy Statement. A statement describing the Proposer's existing operating policies addressing the following personnel areas: hiring, training, scheduling performance, evaluation and discipline of all personnel categories to be utilized by the Proposer.

We have corporate level policies, practices, and procedures that dictate how our managers, supervisors, and front line employees are required to perform while on duty. These cover all of the personnel areas that have been listed above and others. If there is a specific items that the Wisconsin Center District would like to have more information on in regards to this area we would be happy to have our Human Resources Department supply policy and guideline material.

### **3.10 MBE/WBE/DBE/SBE Participation**

Describe how the Proposer will meet or exceed the MBE/WBE/DBE/SBE Participation Level for its specifically describing how MBE, WBE, DBE and SBE firms will be utilized throughout the Contract period. Specific individuals or certified firms need not be identified as part of the Proposal, but must be identified prior to Contract execution. The District encourages race and gender diversity in managerial, supervisory and other professional persons providing goods and services.

We will not meet the participation goal noted by Wisconsin Center District and intend to recruit, hire, and develop all security personnel and event staff for this contract directly.

### **3.11 Acknowledgement and Attestation Form**

A party having signature authority for the Proposer must complete and execute the Acknowledgment and Attestation Form, Section 4.1 of this RFP. Witnessing of a corporation's officers will be by corporate secretary; witnessing of a sole proprietor will be by a notary public; witnessing of partnerships, limited liability companies and joint ventures will be by partners.

Please see a copy of our signed and completed Acknowledgement and Attestation Form found in the Forms section later on in this proposal.





### **3.12 Insurance**

Submit proof of Proposer's insurance coverage for each of the following liability insurance coverage (minimum policy limits in brackets):

- Worker's compensation insurance (statutory limits).
- Commercial and Professional General Liability Coverage including but not limited to all coverage's standard to the 1995 ISO form (not less than \$5,000,000 per claim and in the aggregate).

Please see a copy of our sample Certificate of Insurance which has our coverage levels. This is found in the Attachments section at the end of this proposal.

### **3.13 Performance Bond**

Performance Bond to extend over all phases of the Contract / project with time line penalties, if not completed within dates selected.

Provided we are awarded the bid for Wisconsin Center District we will provide the appropriate Performance Bond to cover our service during the contract period.

### **3.14 Statement Regarding Proposed Contract**

Provide a statement either that (a) all proposed terms and conditions of the Contract are acceptable, or (b) the terms of the proposed Contract are acceptable, except for those matters identified by section number in chronological sequence. For each matter so identified, the Proposer will briefly describe the Proposer's concerns and supply its proposed alternative.

All proposed terms and conditions of the Contract are acceptable, except as follows:

In section 4 on The District's Expectations of the Vendor, found on page 5 of the contract, the last sentence is unacceptable and states: "The Vendor shall communicate with District on a regular basis to guarantee staffing levels are appropriate for the District." The proposed alternative sentence is as follows: "The Vendor shall communicate with the District to assist in seeing that staffing levels are appropriate for the District."

### **3.15 Fee Proposal**

Provide a proposed fee for the Contract as described in this RFP. The Proposer will complete and execute the attached Fee Proposal Form, Section 4.2 of this RFP, by a party having signature authority for the Proposer.

Please see our proposed fee as part of 4.2 Not to Exceed Fee Proposal Form as found in the Forms section later on in this proposal.

### **3.16 Environmental Sustainability**

N/A

Although there is no official question here we would like to point out some item in regards to environmental sustainability. We have made great strides in recent years to reduce our environmental footprint and be more energy efficient.

- We reduced paper consumption by better utilizing electronic invoicing, contracts, and onboarding paperwork. The results of this effort have saved 43 trees last year alone.



- We saved energy by installing LED lights and solar panels in our Cedar Rapids, Iowa branch office. This led to 39,924 pounds of CO2 emissions saved.

### ***3.17 Proposer Affidavit***

Provide a proposed fee for the Contract as described in Section 1.2 of this RFP. The Proposer will complete and execute the attached Fee Proposal Form, Section 4.2 of this RFP, by a party having signature authority for the Proposer.

We have completed section 4.2 of the RFP and it is found later on in this proposal with the other forms required. It was completed and approved by Brad Duffy, our Division President, with signature authority for Per Mar Security Services.

### ***3.18 Disqualification of a Proposer/Proposal***

Wisconsin Center District (the District) reserves the right to reject any or all proposals. Failure by a Proposer to respond thoroughly and completely to all information and document requests may result in rejection of its proposal. Further, the District reserves the right to independently investigate the financial status, qualifications, experience, and performance history of a Proposer. The District reserves the right to cancel the approval or authorization of a contract award, with or without cause, at any time before its execution of a contract and to later enter into a contract that varies from the provisions of this RFP, if agreed to by another Proposer.

We acknowledge and understand this statement.





## **4.0 Forms**

Fill out the forms in section 4.0. Submit all forms back to the Wisconsin Center District as requested on each form. The only exception is Form 4.3 for use by the Proposer.

Please see the following forms on the next pages of this proposal:

- 4.1 Acknowledgement and Attestation Form
- 4.2 Not to Exceed Fee Proposal Form
- 4.3 Proposers Checklist
- 4.4 Certificate of Bidders
- 4.5 List of Proposed Deviations from the Scope-Of-Work Form
- 4.6 Notice of Intent to Bid Form
- 4.7 Questions for Bidders



**4.1 ACKNOWLEDGEMENT AND ATTESTATION FORM (Revised 3.14.19)**

In submitting a Proposal the undersigned certifies that the Proposer has reviewed the Request for Proposals and Addendums A, B, and C attached thereto and Addendum #1 through #7, is familiar with their terms and conditions, and accepts the requirements imposed by them on the Proposer.

I hereby certify that the foregoing is true and correct.

Proposer's Name: Per Mar Security Services

By: *Bradley R. Duffy*

Name: Brad Duffy

Title: President, Security Officer Division

Date: 3/19/2019

Witness: *Marissa L. Parr*

Name: Marissa L. Parr

Title: Executive Assistant

Date: 3/19/2019

OR

Subscribed and sworn to before me this

       Day of       , 20  

\_\_\_\_\_  
Notary Public, State of \_\_\_\_\_

My Commission: \_\_\_\_\_

NOTE: Use full corporate name and attach corporate seal here.

[SEAL]

**4.2 NOT TO EXCEED FEE PROPOSAL FORM**

4.2.1 Provide a complete detailed breakdown to describe the Security Services being provided, anticipated conditions of the work, terms of the Services, and associated costs so as to demonstrate as complete an understanding as possible of the Security Services provided and the costs associated therewith.

4.2.2 The Fees for the Contract:

Standard District Rate	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
	September 1, 2019 – August 31, 2020	September 1, 2020 – August 31, 2021	September 1, 2021 – August 31, 2022	September 1, 2022 – August 31, 2023	September 1, 2023 – August 31, 2024
Event Security Standard Hourly Labor Rate	\$15.71	\$16.02	\$16.34	\$16.67	\$17.00
Event Security Supervisor Labor Rate	\$18.57	\$18.94	\$19.32	\$19.71	\$20.10
Security Patrol Officer Labor Rate	\$18.57	\$18.94	\$19.32	\$19.71	\$20.10

Proposer's labor rate structure with regard to payment of overtime, double time, Holidays, and the like is as follows:

Labor Rate	Labor Rate Description (i.e. days to which each category of pay applies, and hours in each day to which each category applies)
Standard	The standard rate will apply for all days and hours of the normal schedule.
OT	We will bill 1.47 times the standard rate for hours outside the normal schedule where OT is incurred.
Double Time	We will not have a Double Time rate.
Other	N/A
Holiday Pay	The Holiday billing rate will be 1.47 times the standard rate for the six noted holidays below.

WCD will honor the following Holiday's for Holiday Pay. A list to identify the actual date will be provided to the Proposer upon the start of each year of the Contract.

New Year's Day	Memorial Day	Independence Day	Labor Day
Thanksgiving Day	Christmas Day		

PM Program for Metal Detection hand held wands and Magnetometers: Identify name of third party service provider that will supply services and annual fees to be charged by such provider, which fees will be paid, without markup, directly by the District to such provider upon the same terms and conditions as set forth in this Contract.

Service Provider Name / Contact Phone number	Security Detection Justin Brighty Security Director (888) 886-2318 jbrighty@securitydetection.com				
	1 <sup>st</sup> Year	2 <sup>nd</sup> Year	3 <sup>rd</sup> Year	4 <sup>th</sup> Year WCD Option to Renew	5 <sup>th</sup> Year WCD Option to Renew
Annual Fees	\$5,000	\$5,000	\$5,000	\$5,000	\$5,000

Provide the complete PM program proposed by the Service Provider.

4.2.3 Attach to this Fee Proposal Form a complete, detailed breakdown, including, but not limited, to:

- a Cost of all personnel to be charged to the Security Services, and hourly salary rates, projected rate escalation and the multiplier applied to each type of personnel so identified for federal and state taxes, unemployment compensation, insurance and employee benefits (the "Personnel Costs").
- b Identify the amount established by the Proposer as its markup for all overhead and profit (the "Overhead and Profit").

4.2.4 The Proposer shall not impose payment penalties of any kind, including, but not limited to late fees, service charges, cancellation fees, interest, or placing the District on credit hold. (also identified in Section 2.2.8) Agreed

**4.2 SUPPLEMENT**

4.2.3 Attach to this Fee Proposal Form a complete, detailed breakdown, including, but not limited to:

**Personnel Costs**

a. Cost of all personnel to be charged to the Security Services, and hourly salary rates, projected rate escalation and the multiplier applied to each type of personnel so identified for federal and state taxes, unemployment compensation, insurance and employee benefits (the "Personnel Costs").

*Payroll Taxes*

➤ FICA	6.20%
➤ Medicare	1.45%
➤ FUTA	0.60%
➤ SUTA	<u>1.43%</u>
	9.68%

Note: The state unemployment tax rate or SUTA noted above can fluctuate on an annual basis.

*Insurance*

➤ General Liability	0.55%
➤ Workers' Compensation	<u>3.16%</u>
	3.71%

Note: The workers' compensation tax rate noted above can fluctuate on an annual basis.

*Benefits*

➤ Medical Insurance	Approximately 2.00%
---------------------	---------------------

In terms of total personnel costs we also account for training pay, vacation pay, and unplanned overtime.

**Overhead and Profit**

b. Identify the amount established by the Proposal as its markup for all overhead and profit (the "Overhead and Profit").

Our mark-up including all overhead and profit on top of the wage rate is approximately 1.4285.

The billing rates are all inclusive of the following items:

- |                               |                                     |
|-------------------------------|-------------------------------------|
| ➤ Regular Wages               | ➤ General & On-The-Job Training     |
| ➤ Statutory Costs             | ➤ Standard Issued Equipment         |
| ➤ General Liability Insurance | ➤ General & Administrative Overhead |
| ➤ Uniforms                    | ➤ Pre-Tax Profit                    |
| ➤ Supervision                 |                                     |



***Metal Detection Preventive Management Program***

Provide the complete PM program proposed by the Service Provider.

Per Mar Security Services recommends utilizing a company called Security Detection, out of Sylvania, Ohio, for preventative maintenance on the metal detectors. Initially, this would include a full inspection of all the units, which is the year 1 price of \$5,000.00. This includes the inspection of up to thirty-five (35) Garrett PD6500i Walk-Through Metal Detectors.

This cost does not include replacement of parts. Security Detection can provide that service as well. Here is a listing of some of the common replaceable parts and cost:

- TouchPad                      \$35.00
- Power Supper                \$250.00
- Lithium Ion Battery        \$425.00

In addition, if there is an emergency call needed outside of normal preventative maintenance, their individual call rate is \$1,500.00. For each subsequent year, we would also recommend continuing with the same service to ensure the detectors continue to work in optimal fashion.



### 4.3 PROPOSERS CHECKLIST:

#### Bidders Checklist:

- Bid proposal meets specifications. If no, provide Form 4.6  (Yes)  (No)
- Proposal is in order as requested  (Yes)  (No)
- Requested Forms are attached. Example: sample insurance certificate and section 4 forms  (Yes)  (No)
- References are included with the proposal and have email and phone contact information  (Yes)  (No)
- List of 5 similar work locations attached per specifications  (Yes)  (No)
- If applicable, is the Performance/ Payment Bond pricing covering entire project  (Yes)  (No)
- Appropriate Documents Notarized  (Yes)  (No)
- Quality Assurance Plan included  (Yes)  (No)
- MBE/DBE/SBE/WBE participation rates identified  (Yes)  (No)
- Training Program covered in your Proposal  (Yes)  (No)

4.4 CERTIFICATE OF BIDDERS

CERTIFICATE OF BIDDERS

STATE OF Iowa

COUNTY OF Scott

Brad Duffy certifies that he has authority to submit this bid on behalf of Per Mar Security Services and that he has examined (Name of Corporation, Partnership, or Individual) and carefully prepared this bid from the plans and specifications, and he has checked it in detail before submitting it to the Wisconsin Center District.

*Bradley R. Duffy*  
(Signature of Authorized Representative)

President, Security Officer Division  
(Title)

Subscribed and sworn before me this 19th day of March, 2018.

My commission expires January 25, 2020.

*Marissa Parr*  
(Notary Public sign and seal)



**4.5 LIST OF PROPOSED DEVIATIONS FROM THE SCOPE-OF-WORK FORM**

Company Per Mar Security Services

Name: Mark Schaefer

Phone Number: (414) 483-2239

A blank Form submission indicates full compliance with the Security Services RFP

Item	Deviation from Scope
Account Manager	Due to the nature of the account, with both security officers and event security,
Position Addition	which is dynamic and changes from week to week, we believe we need a full
	time dedicated manager to oversee this process for both ends. This would be in
	addition to the existing hours laid out by Wisconsin Center District.

4.6 NOTICE OF INTENT TO BID FORM - WCD Security Services

Due Friday, March 15th by 12:01 pm CST

(Please check one)

We shall submit a proposal

We shall NOT submit a proposal;

Contact Person: Mark Schaefer

Title: General Manager

Company Name: Per Mar Security Services

Street Address: 2323 South 109th Street, Suite 175

City, State and Zip: West Allis, WI 53227

Telephone: (414) 483-2239

E-Mail Address: mark.schaefer@permaresecurity.com

Signature: 

Date: 3/5/2019

Vendors who do not submit this NOTICE OF INTENT TO BID form by the due date, may be removed from our Vendor list for these services. Please e-mail this form to:

**Karen Hopp**  
Purchasing & Special Projects Manager  
Email: [Khopp@wcd.org](mailto:Khopp@wcd.org)  
Phone: 414-908-6073



### **4.7 Questions for Bidders**

1. Identify the number of employees that are available in the Milwaukee Area employed by your company that meet the qualifications of this RFP?

We have 327 employees that meet the qualifications of this RFP in the Milwaukee Area.

2. Identify how many trained Security Patrol staff you will have in your labor pool based upon having consistent assigned staff on-site.

In the State of Wisconsin we have 936 employees that are currently licensed to provide security services. This includes around 275 employees directly in the Milwaukee Area. This is our current direct hiring pool internally. We also will be recruiting for positions outside the company to find candidates who fully qualified to work at the Wisconsin Center District.

3. Identify how many trained Event Security staff you will have in your labor pool based upon the potential of having 110 staff on site at one time.

We currently have 65 dedicated event security staff in our labor pool in the Milwaukee Area. We are at this number due to fulfill our existing client obligations. Due to the needs at the Wisconsin Center District we would be actively recruiting and hiring additional team members. For example, during the summer, when we are staffing festivals and fairs, we have staffing levels upwards of 180 people.

4. Identify how many trained Event Supervisors you will have in your labor pool? Would you consider this a full time or part time position?

We currently have 14 dedicated event supervisors and leads in our labor pool in the Milwaukee Area. We are at this number due to fulfill our existing client obligations. Due to the needs at the Wisconsin Center District we would be actively recruiting and hiring additional team members. For example, during the summer, when we are staffing festivals and fairs, we have staffing levels upwards of 25 people.

5. What is the cost to bring in staff from outside of the Milwaukee area?

There is no cost to the Wisconsin Center District for staffing noted as required in this scope of work.

6. How many back up staff will be trained for each of the positions?

We plan for having 15% to 25% extra staff trained for all positions at the Wisconsin Center District.

7. If the District is short staffed for either Security Patrol and Event Security, what is your response time for being short staffed for Security Patrol and Event Security?

As part of our response for Security Patrol if the District is short staffed we would commit to providing an additional security officer in one hour or less.

As part of our response for Event Security if the District is short staffed we would commit to providing an additional event staff member in one hour.



## ***Attachments***

The following attachments are also included as part of this proposal to Wisconsin Center District:

- Quality Assurance Plan (from 1.15) – 4 pages
- Training Plan (from 2.2.8) – 4 pages
- Certificate of Insurance (from 3.12) – 1 page
- Financial Statements (from 3.6.5) – 5 pages
- Resumes (from 3.7) – 11 pages





## **Quality Assurance Plan**

The Proposer will create a "Quality Assurance Plan" designed for the District. The plan will be submitted with the Proposal. The Quality Assurance Plan will identify the activities (ie. checklists, process standards, and/or project audit) which is meant to ensure that the District is satisfied with the goods or services the proposer is providing.

Per Mar Security Services has created Quality Assurance Plan for the Wisconsin Center District that is designed to ensure we are doing what we say we are going to do. Below are the sections of this plan along with details information for each.

1. Service Manager
2. Key Performance Indicators
3. Customer Feedback
4. Time and Attendance
5. Guard Force Accountability
6. Site Inspection Program

### **SERVICE MANAGEMENT**

Since this is a partnership we assembled a team to manage the Wisconsin Center District and Per Mar relationship, with Mark Schaefer, our General Manager, having overall responsibility for the business aspects of the relationship.

Mark's responsibilities will include, but will not be limited to, the following:

- Arrange and attend pertinent meetings (see more below).
- Communicate the status of all projects, and maintain this communication throughout the two organizations.
- Establish an effective process to organize and document activity, to include creating, managing, and supporting project schedules.
- Assist with recommendations to the overall security of the facility. Our goal is to be a security partner not just for security officer services but for the full protection of your property.

We intend to schedule regular formal meeting with the Wisconsin Center District representative in charge of the contract oversight to ensure we are either meeting or exceeding your expectations. This will be scheduled around your convenience. Here are some of the items covered during one of these meetings:

- A review of current officers assigned and any items of note.
- Making sure the post order manual is up-to-date and instructions being performed properly.
- A rundown of any upcoming events, changes, additional needs, etc.
- Any items of follow-up from previous meetings, from phone conversations, or via email.
- How we are performing as a security partner overall.

### **KEY PERFORMANCE INDICATORS**

We would intend to build a KPI scorecard based upon our agreement with the Wisconsin Center District. As we have done this for other accounts the goal will be to allow for complete measurement of the KPI from one source, along for ease of navigation and review, and perhaps most importantly, the ability to quickly and concisely management the scorecard itself.





Below are some sample KPI's that we could be reviewing for the Wisconsin Center District, however we would welcome input on what is important to you.

- Turnover
- Retention
- Post Inspections
- Post Fulfillment
- Absenteeism
- Punctuality
- Forced Overtime
- Officer Replacement
- Investigations
- Manager Meetings
- Billing Accuracy
- On-The-Job Training

**CUSTOMER FEEDBACK**

Customer satisfaction is our number one priority. To that end, we currently track this on a bi-annual basis and will ask the representative from Wisconsin Center District to also provide us with their comments on our service. The feedback we receive from these evaluations is critical to our continuous improvement. We currently measure two separate metrics within these evaluations.

Below is a breakdown of these metrics and the overall results from the past two years.

<p style="text-align: center;"><b>Net Promoter Score (NPS)</b></p> <p style="text-align: center;"><i>Building customer loyalty</i></p>	<p>The first metric we look at is the Net Promoter Score or NPS. The Net Promoter Score is based on the book "The Ultimate Question" by Fred Reichheld. In the book the following is our ultimate question that we ask our clients.</p> <p style="text-align: center;"><i>How likely would you refer Per Mar Security Services to a friend or business associate?</i></p> <p style="text-align: center; font-size: 24pt;"><b>52.8%</b></p> <p>The above chart that highlights where we currently fall along with how to plot out the scoring for the Net Promoter Score. As you can see, based on the responses our customers, they have currently ranked us an 'Excellent' company. While we still have room to improve as we press for world-class status we are certainly proud of how our customers see us.</p>
<p style="text-align: center;"><b>Customer Satisfaction Score (CSAT)</b></p> <p style="text-align: center;"><i>Tracking support quality</i></p>	<p>In addition to the NPS we also take a look at a traditional Customer Satisfaction Score or CSAT. Beyond referrals this take a look at how our customers see how right now. In our bi-annual surveys this questions is laid out simply as:</p> <p style="text-align: center;"><i>Currently, how satisfied are you with Per Mar Security Services?</i></p> <p style="text-align: center; font-size: 24pt;"><b>92.7%</b></p> <p>This is based on results of the past two years and scored on a traditional 1 to 10 scale with customers qualified as being either 'Somewhat Satisfied' or 'Satisfied' if they scored us a 7 or above.</p>

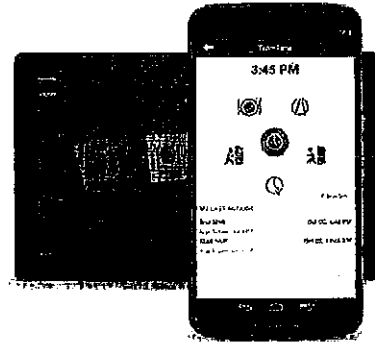


### TIME AND ATTENDANCE

We utilize TeamTime by TEAM Software, which is a versatile, robust time and attendance solution that controls labor costs and automates our timekeeping processes. It also eliminates timesheets, reduces calculation errors, and provides real-time verification

Officers will be required to check-in and out via a phone located at the site. This will be from a recognized number where caller ID has been programmed. It can also be setup to check-in via the eHub app or from a tablet on-site.

And with TeamTime our entire security force is up to the minute on client or company changes. When officers clock in, TeamTime's two-way communications global messaging allows communication with all employees at once with a single message -- automatically delivering essential information including pass-on info, company-wide broadcast, personal and/or group messages -- with confirmed receipt. Employees are able to respond and leave messages for supervisors using this feature.

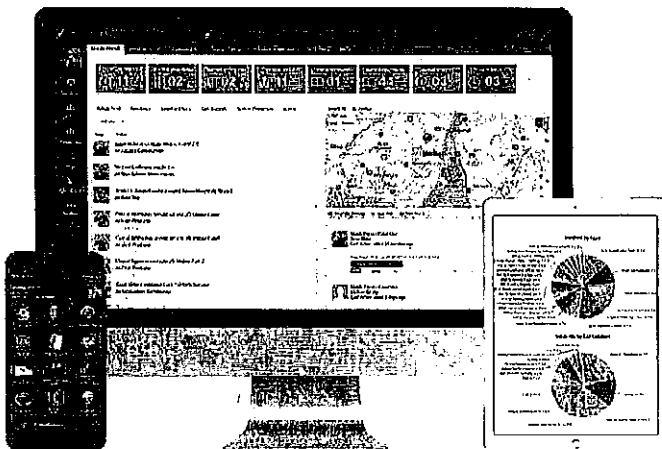


### GUARD FORCE ACCOUNTABILITY

We utilize SecurePatrol™, powered by TrackTik, a fully integrated paperless guard management system for the monitoring, reporting, and managing of security officers and operations with improved efficiency and accountability.

With this platform our Security Officers are able to do patrol tours as well as report incidents and activities in real-time. Managers and clients can monitor, review, and respond instantly from their browsers or smart phone. SecurePatrol™ contains the following program features:

- Live Dashboard: instant access to the vitals of your security operation
- Guard Tour System: ensure officer compliance with established protocols and SLA's
- Reporting: detailed, custom-built incident reporting with automatic notifications
- Dynamic Tracking: GPS history, geo-tagged officer location, and post-incident analysis
- Trends and Analytics: insight from security data to increase operational effectiveness
- Guarding Toolbox: enhance officers' capability and reach plus lone worker safety program



Unlike other guard tour products or systems this platform seamlessly connects all of the above features to deliver data-rich information in real time so you can always make informed decisions. The increased accountability and efficiency of officers in the field will not go unnoticed.

Our online portal for SecurePatrol™ can be found at [permar.staffr.com](http://permar.staffr.com).





**SITE INSPECTION PROGRAM**

We will have an inspection program, in place for Wisconsin Center District that works through eHub, the mobile platform synced up with WinTeam, our labor management software suite.

During the course of the contracted hours of service a manager or supervisor will randomly stop in to perform a formal site inspection at least one time per week. This inspection will be for both the employee and the site itself to make sure we are in compliance with all of your protocols. This program is broken down into three specific categories:

**I. Employee Review**

*An examination of the employee on duty:*

- License present, accounted for, and valid
- Condition of uniform appearance
- Condition of personal grooming
- State of vigilance on duty
- Verification of training compliance

**II. Employee Knowledge**

*A random questioning and/or demonstration of specific post duties:*

- Demonstration of fire alarm response
- Demonstration of visitor sign-in procedures
- Explanation of PPE needed at the site
- Explanation of suspicious activity reaction
- Explanation of power outage procedures

**III. Site Examination**

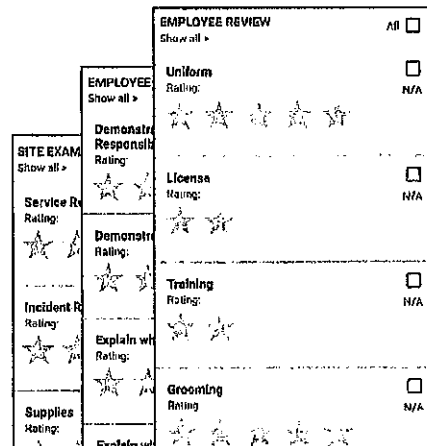
*An examination of the security post:*

- Condition of the post orderliness
- Post orders account for and updated
- Log book is present and updated
- Service reports are present and in order
- Incident reports are present and in order
- Site supplies are present and in good condition
- Note of any current safety hazards
- Note of any current security issues
- Note of any current unauthorized items

Each point in each category has its own rating scale, including what we denote is a deficiency for each of the categories. If a deficiency is noted, it requires a follow-up from the management team to correct the measure. Reports can be compiled on a monthly, quarterly, or as needed basis of all inspections performed at the Wisconsin Center District account.

After completion of the inspection, which is signed by the employee, it is connected in WinTeam to both the Wisconsin Center District account as well as the employee's personnel file.

To the right are screenshots from the inspection report in the eHub app on a smartphone.



**eHub Mobile**





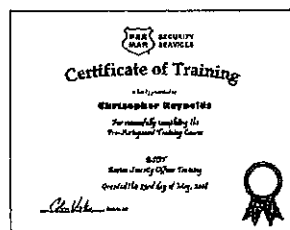
## **Training Plan**

The Proposer will provide to the District, with the Proposal, a complete training plan. The training plan shall include, but not limited to the number of hours each employee will be trained prior to working at the District. All training must be completed and accepted by WISCONSIN CENTER DISTRICT management prior to the contracted staff performing duties at the WISCONSIN CENTER DISTRICT.

We recognize training is crucial to ensuring event staff, security officers, supervisors, and managers have the necessary knowledge and expectations which will complement their skills and motivation. This all starts from the moment an applicant is hired right up until the day they retire from the company. The better the training is, the better the employees will be.

We assign our training in stages, which are summarized here:

1. Pre-Assignment Training
2. On-The-Job Training
3. Supervisory Training
4. Ongoing Training
5. Continuing Education



On the following pages you will find an outline of how each of these stages is compiled from a learning plan standpoint and how it will work for the Wisconsin Center District. Due to the nature of the account we have also divided this out into two sections, one that is directed at personnel working in the Security Patrol positions and one that is directed at personnel working in the Event Security positions.

### STAGE 1 **PRE-ASSIGNMENT TRAINING**

#### **Security Patrol**

At the very core of our training program is our Basic Security Officer Training (BSOT) which is provided to all new employees during the pre-assignment period. This learning experience provides a solid foundation of general security knowledge and information to new security officers.

We accomplish this by utilizing an interactive program of study which includes engaging, up-to-date lessons on safety and security developed by experienced Per Mar professionals and industry experts. Providing the knowledge and tools, and incorporating time to put into practice, builds the essential skills to be a successful and effective security officer. This program is a in class instructor lead 4 hour course. In the class we focus on the history of our company, our values, our expectations, and a basic overview of topics common within the security industry.

This program includes instructor led classroom training covering the following units:

- |  |   |
|--|---|
| <ol style="list-style-type: none"><li>I. Welcome &amp; Company Overview<ol style="list-style-type: none"><li>a. Introductions</li><li>b. Health Care Review</li><li>c. Per Mar History and Structure</li><li>d. Company Values and Mission</li></ol></li><li>II. General Security Topics<ol style="list-style-type: none"><li>a. Safety</li><li>b. Patrol and Report Writing</li></ol></li></ol> | <ol style="list-style-type: none"><li>III. Company Policy Review<ol style="list-style-type: none"><li>a. Dress and Grooming</li><li>b. Anti-Harassment</li><li>c. Drug and Alcohol</li><li>d. Weapons</li><li>e. Technology</li></ol></li></ol> |
|--|---|



- c. Access Control
- d. Emergency Response
- e. Communication

Each unit incorporates group discussions, practical activities, and the opportunity to share experiences. Employees must pass a comprehensive exam administered at the conclusion of training to ensure knowledge transfer and retention. This also allows our instructors to review the key learning points and provide officers the confidence to perform at a high level.

### ***Event Security***

As noted similarly above we also have a Basic Event Staff Training (BEST) program that is a classroom style training to give our staff working Event Security exposure to go about working in an event capacity. This includes the following topics:

- Attendance and tardiness
- Customer service, greeting, and providing assistance
- Conflict de-escalation
- Note taking and report writing
- Event etiquette
- Employee conduct
- Scheduling
- Phone Apps (when to use)
- eHub
- Uniform and grooming standards
- Required tools (e.g. flashlight, radios)
- Cellphones/electronic devices
- Eating and breaks
- Leaving the event site
- Two way radio use
- Evacuations,
- Severe weather
- Lost individual protocols
- Contraband and confiscated items
- Bag and package searches
- Hand wand procedures
- Crowd control



STAGE 2

### **ON-THE-JOB TRAINING**

### ***Security Patrol***

Once the security officer is assigned to Wisconsin Center District they will be required to complete and pass a customized On-The-Job Training (OJT) program. Satisfactory test results are required before a new employee is allowed to work unsupervised. The OJT program will be based off of the post orders as written specifically for Wisconsin Center District and will allow for consistency in training. Post Orders are developed in conjunction with the client and reflect the specific needs of each client location. Our full-time Training & Development Manager ensures all standard operating procedures and training plans are kept current, and reviewed with clients on an annual basis.

This training to learn your site consists of a wide range of subjects such as:

- Wisconsin Center District Overview
- Post Order Details
- Mission Statement
- Introduction to the Site
- Emergency Contacts
- Personal Safety
- Access Control
- Patrol Specifications
- Fixed Post Specifications
- Emergency Responses
- Communications
- Specialized Duties
- Critical Locations
- Technology Overview
- Security Applications



To ensure this training is completed properly and effectively, documentation denoting the training is gone through and signed off on by both the trainer and the trainee. This record is kept on site for future reference and referral as well as maintained in our WinTeam Labor Management software.

### **Event Security**

We would provide an on-site overview for all new event security staff prior to them working a shift, including:

- Site Walkthrough
- Lost and Found
- First Aid Station
- Emergency Procedures
- Break Areas
- Areas Not Allowed to Be
- Smoking Areas
- Surrounding Area Orientation (e.g. Starbucks, Gas Station, etc.)

In addition for any new employees as part of their training they will not be posted alone in a critical area, and will be partnered with an experienced person for guidance and support.



### STAGE 3

## **SUPERVISORY TRAINING**

### **Account Manager**

We have designed a course specifically for all new supervisory staff to prepare them to lead their team. This training will be conducted separately from the other stages and will be proctored by members of our management team to include; Human Resource Managers, Payroll and Scheduling Supervisors, Operations Manager or the General Manager. This will ensure all points of instruction are taught by that segment expert and provide the new supervisor with the best possible training.

This carefully designed Leadership training program is aimed at improving the leadership skills and operational practices of both new and veteran security professionals. Topics and training segments for the Basic Supervisory Training are listed below.

- **Who is Per Mar?**
  - Company Past, Present, and Future
  - Policies & Procedures
  - The Post Order Manual
  - The Client Relationship
  - Your Financial Impact
- **Leadership 101**
  - Being a Supervisor
  - Roles & Responsibilities
  - Motivating Employees
  - Employee Recognition
  - Coaching Opportunities
  - Professional Development
- **Scheduling Functions**
  - Creating and Managing the Master Schedule
  - Handling Overtime
  - Dealing with Call-Offs and No-Shows
  - Scheduling Tips
- **Human Resource Functions**
  - Interviewing Procedures
  - Workers' Compensation
  - Counseling Procedures
  - Where to Get Assistance
- **Inspection Functions**
  - Proper Uniform and Appearance
  - Proper Post Cleanliness
  - Proper Post Etiquette
- **Payroll Functions**
  - How to Properly Sign In
  - Using TeamTime
  - Do's and Don'ts

We also provide Advanced Supervisory Training for those leading our officers in the field. This classroom course is designed to equip participants with the skills, knowledge, confidence, and resources to improve officer satisfaction and retention and techniques for Supervisor insight into officers' growth potential in the security industry. Class graduates create company-wide networks to share best practices and build a culture of continuous improvement.





STAGE 4  
**ONGOING TRAINING**

***Security Patrol and Event Security***

A vital piece of training is our refresher training to ensure that the officers assigned to Wisconsin Center District stay fresh and current on even the fundamental procedures. We routinely schedule annual training sessions with our officers at the site to bring them up to speed with items of importance to Wisconsin Center District as well as new security and industry specific practices.

Topics are a mix of site specific situations, policies, or general security practices such as report writing and safe driving. Every officer is required to complete the training and we will make every effort to keep times and schedules open so that all may attend.



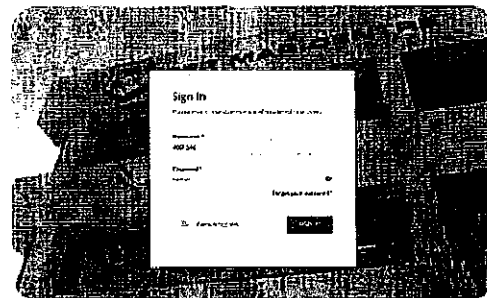
STAGE 5  
**CONTINUING EDUCATION**

***Security Patrol and Event Security***

The continuing education program for our security officers uses a modern straightforward approach by utilizing an online information source. Our Learning Management System called the *Per Mar University*, was setup to be utilized as a free resource and learning tool for our security officers to have at their disposal any time they might need it.

The curriculum for each security officer will be assigned based upon the needs at Wisconsin Center District and to supplement the customized OTJ program. We have training modules in the following areas:

- Access Control
- Basic Security Officer
- Communications
- Emergency Situations & Workplace Violence
- Ethics, Department & Professional Development
- Fire Protection & Life Safety
- General Duties
- Healthcare Security
- Human & Public Relations
- Interviews & Interrogations
- Legal Aspects
- Loss Prevention & Physical Searches
- Officer Safety & Survival
- Patrol & Fixed Posts
- Report Writing
- Security Management
- Shopping Center
- Supervisory Roles
- Traffic Control & Vehicle Safety



<https://university.permarsecurity.com>

Upon completion of each module each Security Officer receives a 'Certificate of Training' denoting his or her individual achievement. Also, our LMS tracks all training and testing done within the system.





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
2/26/2019

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Arthur J. Gallagher Risk Management Services, Inc. 220 Emerson Place, Suite 200 Davenport IA 52801		<b>CONTACT NAME:</b> Jen Rios <b>PHONE (A/C No. Ext):</b> 563-322-3521 <b>FAX (A/C No.):</b> 563-322-1046 <b>E-MAIL ADDRESS:</b> jen_rios@ajg.com	
<b>INSURED</b> Per Mar Security & Research Corp dba Per Mar Security Service; Midwest Alarm Services Inc. PO Box 4227 Davenport IA 52807		<b>INSURER(S) AFFORDING COVERAGE</b>	
		INSURER A : Travelers Casualty and Surety Co of America	NAIC # 31194
		INSURER B : Arch Insurance Company	11150
		INSURER C : Liberty Mutual Insurance Company	23043
		INSURER D : Twin City Fire Insurance Company	20459
		INSURER E : Scottsdale Insurance Company	41297
		INSURER F :	

COVERAGES      CERTIFICATE NUMBER: 2060870387      REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	AGGL	SUBR	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Contractual Liab <input checked="" type="checkbox"/> Errors & Omission GENL AGGREGATE LIMY APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJ <input checked="" type="checkbox"/> LOC OTHER:			BSPKG0281102	3/1/2019	3/1/2020	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 5,000,000 PRODUCTS - COMP/OP AGG \$ 3,000,000 \$
C	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> Valet Parkin <input checked="" type="checkbox"/> Garage/Keypad			AS2-841-434375-058	3/1/2019	3/1/2020	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$ 1,000,000
E	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED      RETENTION \$			XLSD104181	3/1/2019	3/1/2020	EACH OCCURRENCE \$ 5,000,000 AGGREGATE \$ 5,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N	WA7-64D-434375-048	3/1/2019	3/1/2020	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTHER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
C D A	Work Comp (NH) Employee Dishonesty Cyber Liability			WC7-841-434375-068 81KB0327814 108617599	3/1/2019 3/1/2019 3/1/2019	3/1/2020 3/1/2020 3/1/2020	1m/1m/1m 1,000,000 2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 104, Additional Remarks Schedule, may be attached if more space is required)  
Additional Insured (Blanket basis) is included on the General Liability and Auto Liability policies shown above, if required by written contract subject to policy terms, form, and conditions. Waiver of Subrogation (Blanket basis) in favor of same with respects to the General Liability & Auto Liability & Employers Liability if required by written contract subject to policy terms, form, and conditions. The insurance provided under the General Liability & Auto Liability is primary and non-contributory (blanket basis)  
Excess Liability coverage is excess over the underlying General Liability, Auto Liability, & Employers Liability-follows form. (00GL0334 04/08, AICSGPE34 08/02, CG2037 04/13, CG2010 04/13, CA0444 10/13, WC000313)

<b>CERTIFICATE HOLDER</b>  Master Certificate	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE <i>[Signature]</i>
---	--



April 2019

**JOB DESCRIPTION**  
**Manager Level**

<b>Title:</b> Account Manager	<b>Reports To (title):</b> Operations Manager
<b>Line of Business:</b> Security Officer Division	<b>Branch:</b> All Branches
<b>Status:</b> Regular full-time	<b>Location:</b> All Locations
<b>Hours:</b> Hours vary based on account need.	
<b>Responsible for (how many)</b> 20+ per client site	<b>Title(s) of Direct Report(s):</b> Security Officers, Event Staff
<b>EEOC Job Category:</b> (1.2) First/Mid-Level Managers	<b>FLSA Classification:</b> Exempt (salaried)

**Job Summary:**

The primary purpose of this position is to provide supervision of Per Mar Supervisors, Security Officers and Event Staff at an assigned account. Supervisory duties include ensuring proper employee performance by adhering to company and client policies and procedures, counseling and training of employees and scheduling officers to ensure proper security is maintained at the client site according to client contract needs.

**\*Essential Functions and Responsibilities:**

1. Adhere to and enforce all Per Mar and client company policies and procedures.
2. Directly supervise Lead Officers and Security Officers at assigned account.
3. Schedule Lead Officers, Security Officers and Event Staff at assigned account.
4. Prepare and communicate post orders for assigned site.
5. Interview prospective employees for assigned account.
6. Act as liaison between assigned client and the branch office.
7. Address and resolve client issues and complaints.
8. Communicate with Account Manager, Branch General or Operations Manager on regular basis.
9. Review and ensure all payroll information is accurate for employees at assigned account.
10. Prepare, update and submit invoices for security services and all events including "end of event" invoices.
11. Oversee training of all new Lead Officers, Security Officers and Event Staff at assigned account.
12. Perform discipline and evaluations of Lead Officers and Security Officers at assigned account.
13. Maintain and distribute required reports and records.
14. Review Daily Activity Reports, tour reports and incident reports.
15. Oversee the maintenance of all equipment including 2-way radios, hand wands, magnetometers, biometric scanners and Secure Patrol devices.
16. Ensure adequate supplies and uniforms are available and laundered.
17. Responsible for maintenance and upkeep of all company vehicles assigned to Security Officer Division.
18. Responsible for keeping track of mileage as required by client
19. Conduct regular security post checks at assigned account.
20. Enforce and maintain measures to control overtime and training costs.
21. Carry or wear on your person state security license and Per Mar ID card.
22. Maintain a positive work atmosphere by interacting with the Per Mar Security Services internal/external customers (including, but not limited to: current customers, prospective customers, clients, vendors, co-workers, supervisors and management) in a mutually respectful manner regardless of race, color, religion, gender, national origin, age, disability, veteran status, sexual orientation and all other protected classes.
23. Adhere to the highest standards of ethical business conduct and compliance by acting lawfully, ethically, honestly and professionally in the performance of their jobs at all times as well as be in compliance with company policy and procedures as it relates to their job function.

24. When appropriate, inform customers of Per Mar Security Services of products and services and refer business to appropriate department.
25. As this position develops, the employee may be assigned additional duties or special projects as deemed necessary by management.
26. Assume responsibility for understanding and complying with Per Mar Security Services attendance expectations.

\*Essential Functions to be performed with or without a reasonable accommodations

**Additional Management Duties:**

1. Willingness to become involved with professional and civic organizations that will enhance the Per Mar's image and profitability.
2. Perform all supervisory/managerial responsibilities in a manner that fully complies with Per Mar's Equal Employment Opportunity/Affirmative Action Policy and that meets the requirements of all related federal and state regulations. Adhere to all EEO/AA guidelines and regulations in the hiring, placement, promotion, transfer, selection and training processes.
3. Hire, train and mentor direct reports by making sound hiring decisions, training each new hire and current staff as needed and continually mentor staff in order to assist in the successful performance of your direct report(s).
4. Address performance and behavior issues in a timely manner. Work with Human Resources when necessary regarding employee relations issues and follow through with appropriate action. Approach each issue fair and consistently in order to reduce Per Mar's legal risk.

**Education and/or Experience:**

1. High School Diploma or GED is required.
2. Associate's degree (A. A.) or equivalent from two-year college or technical school; or six months to one year previous supervisory and/or security experience and/or training; or equivalent combination of education and experience is required.  
5-10 years of experience in security, special events, law enforcement or equivalent.

**Knowledge/Skills/Abilities:**

1. Basic computer skills with demonstrated experience in Microsoft Office Suite including Word and Excel, as well as internet skills are required.
2. Must be able to read and interpret documents such as safety rules, operating and maintenance instructions, procedure manuals, short correspondence, and memos.
3. Must be able to write reports and correspondence.
4. Must be able to effectively present information in one-on-one and small group situations to customers, clients, and other employees of the organization
5. Must be able to operate office equipment such as copier and fax machines.
6. Excellent written and verbal communication skills are required.
7. Strong customer service focus/skills a must.
8. Must be detail-oriented and able to handle multiple tasks.
9. Must be capable of handling challenging and stressful situations without decreasing productivity.
10. Must be able to effectively work with people at all levels of the organization internally and externally.
11. Must be able to add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to compute rate, ratio, and percent and to draw and interpret bar graphs.
12. Must be able to carry out instructions furnished in written, oral, or diagram form.
13. Must be able to interpret of a variety of instructions furnished in written, oral, diagram or schedule form.
14. Must have good problem-solving skills.
15. Must be able to physically stand post for each shift, as needed.
16. Must be able to physically perform all Security Officer duties on all shifts and the sites supervised.

17. Must possess the values important to Per Mar Security – Integrity, Communication, Excellent Service, and Accountability.

**Physical Demands:**

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is regularly required to talk or hear. The employee frequently is required to walk and use hands to finger, handle, or feel. The employee is occasionally required to stand; sit; reach with hands and arms; stoop, kneel, crouch, or crawl; and taste or smell. The employee must occasionally lift and/or move up to 50 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, and ability to adjust focus.

**Work Environment:**

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job (including but not limited to, duties involving site surveys, client visits and post inspections), the employee is occasionally exposed to wet and/or humid conditions, moving mechanical parts, fumes or airborne particles, toxic or caustic chemicals, outside weather conditions, risk of electrical shock, radiation and vibration. The noise level in the work environment is usually quiet to moderate, resulting primarily from phones ringing, printers and traffic of individuals within the office environment.

**Employee Notice of Receipt:**

\_\_\_\_\_  
\*Employee Signature

\_\_\_\_\_  
Employee Name (PLEASE PRINT)

\_\_\_\_\_  
Date

(\*signature acknowledges receipt of Job Description only)

Per Mar Security Services

5/15/2019

Preventative Maintenance Program for Wisconsin Center District owned Garrett Handheld and walk thru Metal Detection equipment.

Inspections coordinated by Per Mar Security. Equipment information supplied to both Per Mar Security and Wisconsin Center District.

Annual inspections covering Garrett preventative maintenance requirements.

Preventative Maintenance to include, but not limited to

Certificate of Conformance for hardware and software configuration.

Physical Inspection

Operational Verification

Noise (interference) Test

Detection Test

Discrimination Test

Final Settings

Volume, Counter, Tone, Pace Lights, Zone Lights, Alarm Time, IR Analysis, Language, Sync, Channel, Program, Base Sens, Zone 1 to 5 Boost, Zone 6 Boost, Relay, OP Enable, and Bar Graph.