



City of Largo, Florida

Post Office Box 296, Largo, Florida 33779-0296

Office of Management and Budget

Administration (727) 587-6727

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**CITY COMMISSION
LARGO, FLORIDA
REQUEST FOR PROPOSAL**

Proposal #: **09-P-299**

Date: July 28, 2009

Sealed proposals will be received by the City of Largo Office of Management and Budget, located at Largo City Hall, 201 Highland Ave., Largo, Florida 33770, Mailing address: Post Office Box 296, Largo, Florida 33779-0296, until

4:00 p.m., local time

October 1, 2009

FOR

WORK ASSET MANAGEMENT SYSTEM (WAMS)

In lieu of a mandatory pre-proposal meeting the City will accept questions submitted in writing via e-mail to WAMS@largo.com. All questions must be submitted no later than 5:00 p.m, local time on September 1, 2009. Questions will be responded to by way of addendum(s) which will be posted on the City's website, www.largo.com.

Said proposals should conform to the specifications outlined in the request for proposal. The City reserves the right to reject any and all offers and to waive minor informalities.

If you are interested in responding, please prepare **one (1) marked original, five (5) copies of a proposal and one (1) CD with entire proposal and completed questionnaire** and submit them to the Office of Management and Budget by the date indicated. Late offers will be rejected.

If you have any questions of a technical nature, please contact Gary Glascock at 727-518-3080.

If you have any questions regarding the Request for Proposal, please contact Joan Wheaton, Office of Management and Budget, (727) 587-6727.

PROPOSAL and ADDENDUM DOCUMENTS CAN BE DOWNLOADED FROM THE CITY WEBSITE

www.largo.com - click the Business Tab - click Bid/Rfp listings - click View List of current bids/rfps.

**BY ORDER OF THE CITY COMMISSION
LARGO, FLORIDA**

Joan Wheaton, Procurement Analyst
Office of Management and Budget

**Please indicate RFP number
on your response envelope.**

REQUEST FOR PROPOSAL

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PART I

INSTRUCTIONS TO PROPOSERS AND GENERAL PROVISIONS

Purpose

In order to improve the management of the sanitary sewer system assets it owns, the City of Largo (Largo) intends to procure a Work and Asset Management System (WAMS) with an integrated warehouse module. The WAMS procured will be expected to track work orders, maintenance activities, parts and resources.

Serving a customer base population of approximately 110,000 people, the City operates and maintains a sanitary sewer collection, treatment, and disposal system composed of approximately 255 miles of gravity sewers, 48 miles of force mains, 52 city-owned lift stations, and one 18 million gallon per day (MGD) wastewater reclamation facility. The City's current maintenance management system is primarily paper-based with a limited use of software for sanitary sewer service request tracking. The current maintenance management system depends upon the use of OpenOffice spreadsheets and Microsoft Access databases for service request tracking of system maintenance. The City does not currently utilize any integration tools to facilitate data sharing across systems or integration with the City's developing geographical information system (GIS).

The City desires a WAMS that will equip its staff to receive incoming work requests, generate and track work orders, and track parts, materials, and other resources. The broad goals of automating the asset management and maintenance processes with a WAMS and the integrated tools are to:

1. Manage and track maintenance work performed by City of Largo Environmental Services Department (ESD) through planning, scheduling and data analysis.
2. Respond promptly to service requests and make repairs within an acceptable time period.
3. Ensure that requested materials and spare parts are readily available or can be obtained within an acceptable time period.
4. Manage sewer system performance.
5. Forecast future system needs and establish management protocols for optimum performance.

By utilizing the WAMS to track assets, parts and resources, the City will have information on usage, cost to project or work order and increased intelligence on asset behavior (reorder point, economic order quantity, and lead time to receipt).

Scope of Work

The Proposer must provide an approach that meets the Minimum Requirements, complies with all parts of the Scope of Work and includes all Milestones and Deliverables

General

The WAMS is to be installed and operated under the following conditions:

1. The City will operate the WAMS with an in-house data center.
2. The Proposer will provide on-going support for the WAMS software and service components.
3. The City will have perpetual use of the software licenses.
4. The City will work with the Proposer during the implementation of the new WAMS systems

5. Product configuration rather than product modification will take precedence.
6. **The City will consider altering its business processes to fit the new workflows instead of implementing custom software.**

Definitions (as used herein)

- a. The term "Request for Proposal" means a solicitation of proposals. The acronym "RFP" means Request for Proposal.
- b. The term "proposal" means the offer of qualitative evaluations by the proposer.
- c. The term "professional services" means those services of architects, auditors, dentists, engineers, landscape architects, lawyers, physicians, psychologists, surveyors and any other professional service as determined by the City.
- d. The term "proposer" means the one making an offer.
- e. The term "Change Order" means a written order signed by the Office of Management & Budget or authorized representative directing the vendor to make changes to a contract or purchase order resulting from the RFP.
- f. The term "City" means the City of Largo, Florida.
- g. The term "City Commission" means the governing body of the City of Largo.

Preparation of Request for Proposals

- a. Proposers are expected to examine the minimum requirements and all special and general conditions. Omission on the part of the proposer to make the necessary examinations and investigations, or failure to fulfill in every detail the requirements of the contract document, will not be accepted as a basis for varying the requirements of the City or the compensation to the vendor. Failure to do so is at the proposer's risk. Each offerer shall furnish the information required in the Request for Proposal for Professional Services. The proposer shall sign the Request for Proposal and print or type his/her name, address, and telephone number on the face page.
- b. The apparent silence of any supplemental minimum requirements as to any details or the omission from it of a detailed description concerning any point will be regarded as meaning that only the best commercial practices are to prevail. All workmanship is to be first quality. All interpretations of the minimum requirements shall be made upon the basis of this statement.
- c. Proposals shall be submitted on the Proposal Summary Form submitted with the specifications, other formats will be rejected. Unless otherwise stated within the specifications, **responses to the RFP shall have (1) marked ORIGINAL , (5) copies and (1) CD which will include the entire proposal and completed questionnaire submitted** for evaluation purposes.
- d. The firm should retain a copy of all documents for future reference.
- e. All proposals must be signed with the firm name and by an officer or employee having authority to

bind the firm by his/her signature.

- f. Failure to follow the instructions in the Request for Proposal is cause for rejection of offer.

Submission and Receipt of Proposals

- a. Proposals must be received before the specified time as designated in the RFP. A list of firms who submitted proposals will be furnished, upon request.
- b. Proposals shall be submitted in a sealed envelope. The envelope shall show the hour and date specified for receipt of RFP, the RFP number, and the name and address of the firm.
- c. The City of Largo is not responsible for the U.S. Mail or private couriers in regard to mail being delivered by the specified time so that a proposal can be considered.
- d. Telegraph and Facsimile (FAX) proposals will not be considered however, proposals may be modified by telegraphic and FAX notice, provided such notices are received prior to the hour and date specified.
- e. Late proposals will be rejected.
- f. Proposals having any erasures or corrections must be initialed by the offerer in ink. Proposals shall be signed in ink. All amounts shall be typewritten or completed in ink.

Acceptance of Offer

The signed proposal shall be considered an offer on the part of the proposer; such offer shall be deemed accepted upon issuance by the City of a Purchase Order, Blanket Purchase Order, or other contractual document.

The contract will be awarded to the most responsible and responsive proposer whose proposal meets the minimum requirements, and criteria set forth in this RFP.

The City reserves the right to accept or reject any and all proposals or parts of proposals, waive minor informalities.

The City reserves the right to award the contract on a split-order, lump-sum, or individual-item basis, or such combination as shall best serve the interest of the City unless otherwise specified.

Discrepancies, Errors, and Omissions

Any discrepancies, errors, or ambiguities in the Request for Proposals or addenda (if any) should be reported in writing to the City's Purchasing Manager. Should it be found necessary, a written addendum will be incorporated in the Request for Proposals and will become part of the Purchase Agreement (contract documents). The City will not be responsible for any oral instructions, clarifications, or other communications.

Right to Reject Proposal

Right is reserved to reject any or all proposals and to disregard typographical, mathematical, or obvious errors. The City will not pay costs incurred by any proposer in the preparation of proposals.

Evaluation Criteria

Selection will include an analysis of proposals by a selection committee composed of technical advisory staff to ensure responses meet the City's minimum technical requirements. The committee will report its findings and recommendations to the City Manager who shall then make a recommendation to the members of the City Commission.

The City may shortlist more than one Proposer for further questions and evaluation. The City may require that selected Proposers respond to a listing of detailed requirements and perform a WAMS solution demonstration. These demonstrations are to display the Proposer's capabilities as it pertains to the City of Largo's requirements for a complete WAMS solution. The demonstrations will be performed at the invitation of the City of Largo. Requests for demonstrations or site-visits will be sent to Proposers after the defined proposal submission date.

The selected Proposer(s) response to stated criteria may be verified by the City. This verification may consist of reference checks, interviews, and site visits.

Proposals will be evaluated by the City and the Proposer will be selected based on, but not limited to, the following criteria:

- a. Ability, capacity and skill to perform the contract or provide the service required.
- b. Experience on similar projects in Florida and in the Tampa Bay Area.
- c. Personnel assigned to the project and qualifying credentials to perform, specifically associated with utility systems and the availability of each to this project.
- d. Experience of personnel assigned to the project.
- e. Location of office to perform the proposed service.
- f. Project Approach and Schedule in compliance with system requirements, potential benefits associated with respondent's unique knowledge and experience with Work Order and Asset Management Systems specifically associated and utility work.
- g. Financial Responsibility
- h. Cost

Compensation

Compensation which is determined to be fair, competitive and reasonable will be considered during the negotiations of a final contract with the selected proposer.

Payment

Payment for the project will be on a lump sum basis. Progressive payments will be made but will not exceed the percent as listed for each level.

Fiscal Non-Funding Clause

In the event sufficient budgeted funds are not available for a new fiscal period, the City shall notify the vendor of such occurrence and contract shall terminate on the last day of the current fiscal period without penalty or expense to the City.

Conflict of Interest

The proposer certifies that, to the best of his knowledge or belief, no elected/appointed official or employee of the City of Largo, a spouse thereof or other person residing in the same household, is financially interested, directly or indirectly, in providing the goods or services specified in this proposal. Financial interest includes ownership of more than five percent of the total assets or capital stock or being an officer, director, manager, partner, proprietor, or agent of the business submitting the proposal or of any subcontractor or supplier thereof providing goods or services in excess of ten percent of the total proposal amount.

Additionally, the proposer, on company letterhead, must divulge at the time of proposal submittal, any relative, other than those already specified, of an elected /appointed official or employee of the City of Largo who has a financial interest, as defined herein, in providing the goods or services specified in the proposal. The City, at its sole discretion, will determine whether a conflict exists and whether to accept or reject the proposal.

References

This form should contain only clients of a governmental entity, contact person, phone number and date of services.

Public Entity Crimes

A person or affiliate who has been placed on the convicted vendor list following a conviction for public entity crime may not submit a proposal on a contract to provide any goods or services to a public entity, may not submit a proposal on a contract with a public entity for the construction or repair of a public building or public work, may not submit proposals on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or consultant under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

Options

When the City requests proposals with options regarding the extent of services to be provided, the City requests all proposers to provide a cost breakdown for each option proposed. Although all options may be purchased, some may not. The City reserves the right to decide, at its discretion, which options shall be purchased.

The City reserves the right to engage more than one firm if it is believed that different firms might best serve the City's interests in performing different segments of the work (e.g. one firm to provide building estimates, and another to provide infrastructure estimates).

Subcontracting

Where proposers do not have the "in-house" capability to perform work desired in the Request for Proposal, subcontracting may be permitted with prior knowledge and approval of the City. The City must be assured and agree that any proposed subcontractor(s) can perform work of the desired quality and in a timely manner. Therefore, the name(s) of any intended subcontractor(s) should be given in the Proposal.

Failure to Submit Proposal

If you do not wish to submit a proposal, return the RFP and state reason; other-wise, your name may be removed from our mailing list.

Default of Contract

In case of default by the proposer, the City may procure the services from other sources and hold the proposer responsible for any excess costs occasioned or incurred thereby.

Modification for Changes

No agreement or understanding to modify this RFP and resultant purchase order or contract shall be binding upon the City unless made in writing by the Office of Management and Budget.

Order or Precedence

In the event of an inconsistency between provisions of the RFP, the inconsistency shall be resolved by giving precedence in the following order: (a) Instructions to Proposers and General Provisions; and, (b) the minimum requirements.

Examination of Records

The proposer shall keep adequate records and supporting documentation applicable to the subject matter of this RFP to include, but not be limited to, records of costs, time worked, working paper and/or accumulations of data, and criteria or standards by which findings or data are measured. Said records and documentation shall be retained by the proposer for a minimum of one year from the date the contract is completed and accepted by the City. If any litigation, is started before the expiration of the one year period, the records shall be retained until all litigation, claims, or audit findings, involving the records have been resolved, unless otherwise instructed by the City. Should any questions arise concerning this contract, the City and its authorized agents shall have the right to review, inspect, and copy all such records and documentation during the record retention period stated above; provided, however, such activity shall be conducted only during normal business hours and shall be at City expense. Proposers shall be authorized to retain microfilm copies in lieu of original records, if they so desire.

Any subcontractor(s) employed by an proposer who is subject to these requirements and the proposer is required to so notify any such subcontractor(s).

Hold Harmless

The parties recognize that the Contractor/Vendor is an independent contractor. The Contractor/Vendor agrees to assume liability for and indemnify, hold harmless, and defend the City, its commissioners, mayor, officers, employees, agents, and attorneys of, from, and against all liability and expense, including reasonable attorney's fees, in connection with any and all claims, demands, damages, actions, causes of action, and suits in equity of whatever kind or nature, including claims for personal injury, property damage, equitable relief, or loss of use, arising out of the execution, performance, nonperformance, or enforcement of the terms and conditions of this Agreement, Invitation for Bid or Request for Proposal, whether or not due to or caused by the negligence of the City, its commissioners, mayor, officers, employees, agents, and attorneys excluding only the sole negligence of the City, its commissioners, mayor, officers, employees, agents, and attorneys. The Contractor's/Vendor's liability hereunder shall include all attorney's fees and costs incurred by the City in the enforcement of this indemnification provision. This includes claims made by the employees of the Contractor/Vendor against the City and the Contractor/Vendor hereby waives its entitlement, if any, to immunity under Section 440.11, Florida Statutes. The obligations contained in this provision shall survive termination of this Agreement and shall not be limited by the amount of any insurance required to be obtained or maintained under this Agreement. Nothing contained in the foregoing indemnification shall be construed to be a waiver of any immunity or limitation of liability the City may have under the doctrine of sovereign immunity or Section 768.28, Florida Statutes.

Qualification of Proposer

A proposer may be required, before the award of any contract, to show to the complete satisfaction of the City that he has the necessary facilities, equipment, ability and financial resources to perform the work in a satisfactory manner within the time specified.

Disqualification of Proposer

Any or all proposals will be rejected if there is any reason for believing that collusion exists among the proposers, and participants in such collusion will not be considered in future proposals for the same work.

Licenses and Permits

The Proposer shall secure all licenses and permits and shall comply with all applicable laws, regulations and codes as required by the State of Florida, or by the City of Largo. The Contractor must fully comply with all Federal and State Laws and County and Municipal Ordinances and Regulations in any manner affecting the performance of the work.

Provisions for Other Agencies

Unless otherwise stipulated by the proposer, the proposer agrees to make available to the Government agencies, departments, and municipalities the prices submitted in accordance with said terms and conditions therein, should any said governmental entity desire to buy under the proposal.

Additional Information

Additional information may be obtained from the Office of Management and Budget, (727) 587-6727, or from the individual listed on the RFP cover letter.

PART II
SPECIFIC PROPOSAL REQUIREMENTS
WORK ASSET MANAGEMENT SYSTEM (WAMS)
RFP # 09-P-299

Format

To assure consistency, proposals must conform to the following format:

Cover Letter

Table of Contents

Sections

- A. Introduction
- B. Qualifications
- C. Other Information
- D. References
- E. Software Requirements Questionnaire
- F. Cost and Time

Section A - Introduction

This section should contain information about your firm's experience and background and a brief statement of approach to the work, understanding of the project's goals and objectives and demonstrated understanding of the project's potential problems and concerns. Include information regarding experience in this type of service, number of years, number of employees, etc.

Section B - Qualifications

This section should contain qualifications of personnel. Please submit resumes of key personnel who will be assigned to this contract.

1. Provide resumes for each of the key personnel proposed for this project with specific emphasis on the Project Manager.
2. All proposed key personnel must have at least a minimum of three (3) years work experience with WAMS system configuration and implementation.
3. The Project Manager must have a minimum of five (5) years experience in WAMS system implementation.
4. Each resume should be limited to no more than three (3) pages per person and be organized according to the following:
 - Name and Title
 - Professional Background
 - Current and Past Relevant Experience
 - Relevant Training
 - Courses completed during past five (5) years
 - Previous Work Experience related to WAMS
 - Include two (2) references for each key personnel member on similar projects.
 - Include the role and responsibilities that each key personnel member will perform on this project.

Section C - Other Information

This section should address any other information necessary for a full understanding of your services and approach to delivering a complete WAMS solution for the City of Largo. Please provide the following information as part of the proposal:

Project Plan

1. Name, address and telephone number of one (1) individual to whom all future correspondence and/or communications will be directed.
2. The Project Plan must address the management approach in completing the work identified in the Scope of Work. At a minimum, the plan must identify all major tasks, when the major tasks will start and finish, planned reviews of work associated with each major task, project completion date, and any other information that will assist in the planning and tracking this project successfully. Describe methodologies including best practices and benchmarks to be used.
3. Description of project deliverables.

Proposer Financial Information

Proposers will be evaluated on the strength of their Financial Statements. Annual reports include Financial Statements from recent years, which will also be reviewed. The review will focus upon the Proposer's Statement of Income, Balance Sheet and Cash Flow Statements. Ratio Analysis will be included in determining the Proposer's financial strength as well as a review of the sources and uses of funds.

Financial Statement/Capability

In order for the City to evaluate, verify and understand the Proposer's financial capability, the following documentation is requested for the Proposer:

1. Provide annual reports and financial statement for the last three (3) years, including income statements, balance sheets, and any changes in financial position.
2. The latest quarterly financial report and a description of any material changes in financial position since the last annual report.
3. Proposer's most recent Dun & Bradstreet and/or Value Line Reports.
4. Documentation and discussion of the financial condition and capability of the Proposer (s).
5. State whether the Proposer or any member of the Proposer's team has ever filed a petition for bankruptcy, taken any actions with respect to insolvency, reorganization, receivership, moratorium, or assignment of benefits of creditors, or otherwise sought relief from creditors. If yes, please provide an explanation of the circumstances.

Availability of Key Personnel

1. Percentage of time key personnel will spend on this project
2. Current workload of key personnel

Location of Firm

Please provide the business location (the term business location means a physical structure, office of suite but does not include a post-office box or a temporary job or project site location) of the Proposer or Bidder.

Section D - References

This form should contain organization name, contact person, phone number and date of services. In accordance with the minimum qualifications in this RFP, identify five (5) projects where the Proposer has performed WAMS configuration and implementation with entities comparable to the City of Largo within the past five (5) years. Such entities include cities and/or counties which provide sanitary sewer services. Limit your response to one (1) page per project; please provide the following information for each project:

- The name of the project, the owner, year performed and the project location.
- A description of the project.
- A reference, including a contact name, addresses and phone number. This reference should be the owner's staff member who was in charge of the project for the owner.

Section E – Software Requirements Questionnaire

The Proposer will also be evaluated on their response to the City's system application and technical requirements questions. The Proposer must include and name all necessary software required to fulfill the requirements. All software needed to fulfill these requirements must be listed and priced on the Project Proposal Form.

It must be fully understood that City of Largo considers this document and the proposal to be the legally binding agreement of the capabilities of the proposed solution and service(s).

The Proposer will be able to record their answers on a spreadsheet and print out their responses by downloading and printing the file that is included as an attachment to this document.

The Proposer will ensure, at a minimum, that all requirements are responded to with a code of 'Yes' or 'No' in one of the four column of the Proposer Response Columns. Proposer must be available for the system demonstration and user system-testing phase of the project. The Proposer is encouraged to include comments where ever the Proposer believes this will help the City understand the Proposer's response. This requires only "Yes" and "No" responses. All questions must be answered. If the Proposer fails to answer a question, The City of Largo reserves the right to disqualify the Proposer.

1. Complete the answer to all questions.
2. Please answer all questions with either a "Yes" or "No" response in the most appropriate column under "Proposer Response". Any additional information may be added to the comments field.
3. If there are questions that are not clear or which may be misunderstood, answer with "No" and provide a reason in the comment field.

4. Upon Completion of the Requirements Survey, **PRINT AND SUBMIT THE SPREADSHEET QUESTIONNAIRE WITH THE PROPOSAL SUBMISSION AND ALSO INCLUDE THE SPREADSHEET INFORMATION ON THE CD TO BE SUBMITTED.**

Section F - Cost and Time

This section must clearly state the cost and estimated completion time associated with the project.

This section must clearly state the cost and estimated completion time associated with the project.

The Price Proposal shall include current information and shall be arranged and include content as described below:

Section 1 - Introduction

The Proposer shall include an introduction which outlines the contents of the Cost Proposal.

Section 2 - Completed Price Proposal Forms

The Proposer is required to complete Price Proposal Form below:.

No.	Task	Total Cost
I.	Total Software costs (*)	
II.a.	WAMS Software System	
II.b.	Warehouse System (If Applicable)	
II.c.	Third Party Software (if Applicable)	
III.	System Implementation Plan	
IV.	System Implementation Services	
V.	System Support Services	
VI.	Maintenance Costs for 1 st Year	
VII.	Annual Maintenance Support After 1 st Year	
	TOTAL PROPOSED COST	

Please attach a FULL DESCRIPTION OF THE PROPOSED APPROACH AND COST BREAKDOWN FOR EACH TASK I – VII.

(*) A breakdown of all software costs supplied as part of this proposal is required. Only list the Hardware and Software that is being supplied directly as a part of this proposal in the breakdown listed for Tasks I and VII.

Detail any required additional hardware or software that the City of Largo must obtain separately, or that is assumed to be currently owned by the City, from this proposed cost. Please include a clearly marked additional breakdown of required/assumed hardware and software as part of the cost proposal. Failure to outline the required additional hardware and software, as well as assumed hardware and software will be considered a failure to respond.

Please provide a detailed breakdown of what the additional costs would be should the City add a new user to the system for each potential 'role' in the system, such as, GIS Analyst, Customer Service Representative, Maintenance Worker, Field Worker, Planner/Scheduler, etc.

Additionally, please detail the costs of training for additional work-force, as well as a complete detail of costs for maintenance for each year for the four (4) years following the initial year of installation. Provide an estimated cost for future system upgrades and transition to a new system version within the next five (5) years.

No	Description	Cost
I	Price per additional concurrent user, or desktop user	
II	Price per unit for additional 3 rd party software	
III	Price for any required additional 3 rd party software	
IV	Maintenance Contract Cost per year	
V	Price for additional training per class (Max 10 Persons)	
VI	Price for future system upgrades (years 1-5)	

Section 3 – User License Agreement

Please provide a description of the user license usage (concurrent, per seat, enterprise, etc.) standard service level agreements, and all related performance requirements.

**PART III
CITY OF LARGO, FLORIDA
MINIMUM REQUIREMENTS/SPECIAL CONDITIONS
FOR
WORK ASSET MANAGEMENT SYSTEM (WAMS)
RFP # 09-P-299**

Minimum Requirements

At a minimum, the Proposer must provide a WAMS that meets the requirements listed below:

1. The Proposer must provide a comprehensive WAMS solution that has been in production at a minimum of five (5) municipal utilities of similar functionality to the City of Largo.
2. The Proposer must provide a comprehensive WAMS solution that can be implemented with minimal modifications required by the City; the City is not interested in extensive product customization. The product(s) must also be from an established software developer(s) that can provide ongoing application support and product updates over time.
3. The Proposer must provide a comprehensive WAMS solution that has a non-proprietary browser interface.
4. The WAMS solution must also be able to accommodate assets for approximately 255 miles of sanitary sewer collection system pipe, 48 miles of force main, 52 lift stations, an 18 MGD wastewater reclamation facility, 87 miles of reclaimed system, parts and resources.
5. The Proposer must provide a comprehensive WAMS solution that will allow the City of Largo to manage service requests/work orders; track asset work activity history; manage system maintenance; manage warehouse, parts and interface with a GIS database.
6. Proposer provides configuration, integration and interface code to the City if awarded the contract.
7. Proposer will agree to provide source codes to the City if awarded the contract.
8. The Proposer must be willing to act as primary contractor with complete responsibility for installation, configuration, integration and data migration activities and ultimate success of the project.
9. The Proposer must have a good record of responsiveness to the needs of its installed customer base. The City may evaluate Proposer references as part of the proposal review process.
10. The WAMS system(s) must allow for customization and modifications by user.

Schedule of Work

Proposer shall not proceed to furnish such services and City shall not become obligated to pay for same until a written authorization to proceed (Notice to Proceed) has been sent to the Proposer from the City. The time of performance shall begin upon the date of Notice to Proceed and continue for a total contract time not to exceed 468 calendar days. Services shall be furnished in accordance with Proposed Implementation Schedule. The Proposer shall begin work under this agreement no later than five (5) days after the effective date of notification to proceed.

Geographic Information System

The City is currently planning for GIS improvements and considering several different platforms. The plan will be for the WAMS to have the ability to invoke the City GIS and other external systems via a hyperlink, and pass parameters in the Uniform Resource Locator (URL) query string. The City GIS could be called with a HTTP URL, passing an operation code and feature id (connection id, parcel id, etc.) in the query string. The WAMS will have the ability to interface with a GIS using service address, parcel identification number, connection identification number, etc. as indexed access paths. The proposer must present their capabilities to interface with any of the following GIS: ESRI, Bentley, Autodesk or any generic GIS viewer interface.

Reporting

The WAMS will support the development of user-defined report output options: sort information by multiple fields as chosen by a user, minimize information selection based on multiple field criteria and multi-level totaling as defined by a user. The WAMS will include standard reports for the following: maintenance costs, hours of work performed, service requests, and miscellaneous historical reports. The WAMS will allow for the user to define "ad hoc" queries and reports and to generate and view a report on-line before printing. The WAMS will allow a user to view a report by selecting transactions by any combination of date ranges, transaction types, asset ID, etc.

The New WAMS Solution

The Proposer must provide a WAMS that is equipped to receive incoming work/service requests; generate Work Orders; and track Work Orders, parts, materials, and other resources. The Proposer must provide the ability to use integration tools to facilitate data sharing across systems with the City.

Category	Functional Group	# of Primary Users
WAMS	Sanitary Sewer Maintenance	10
WAMS	Wastewater Reclamation Facility Maintenance	10
WAMS	Warehouse-Purchasing Management	3
WAMS	Administration and Support Staff	5
WAMS	IT System Administrators	5
WAMS User Subtotal		33

WAMS Interfaces

The WAMS system will be used by several departments within City of Largo which will require interfaces to different systems in order to minimize manual efforts. The following are the required interfaces as indicated in Figure 1, below.

- Geographic Information System (GIS) is being planned by the City, (Bentley is preferred).
- Mobile Handheld Units, is being planned.
- Granite XP PACP module for CCTV and condition assessment data.
- Internet – For Inter-departmental access and use.
- Financial System (General Ledger) is American Data Group.
- Warehouse System (If separate from WAMS).
- Hydraulic Model is InfoWorks CS.
- SCADA – Wonderware(plant operations) , Data Flow (lift station operations, pump run time and lift station data).
- OpenOffice Suite is used for documents, presentation and spreadsheets.

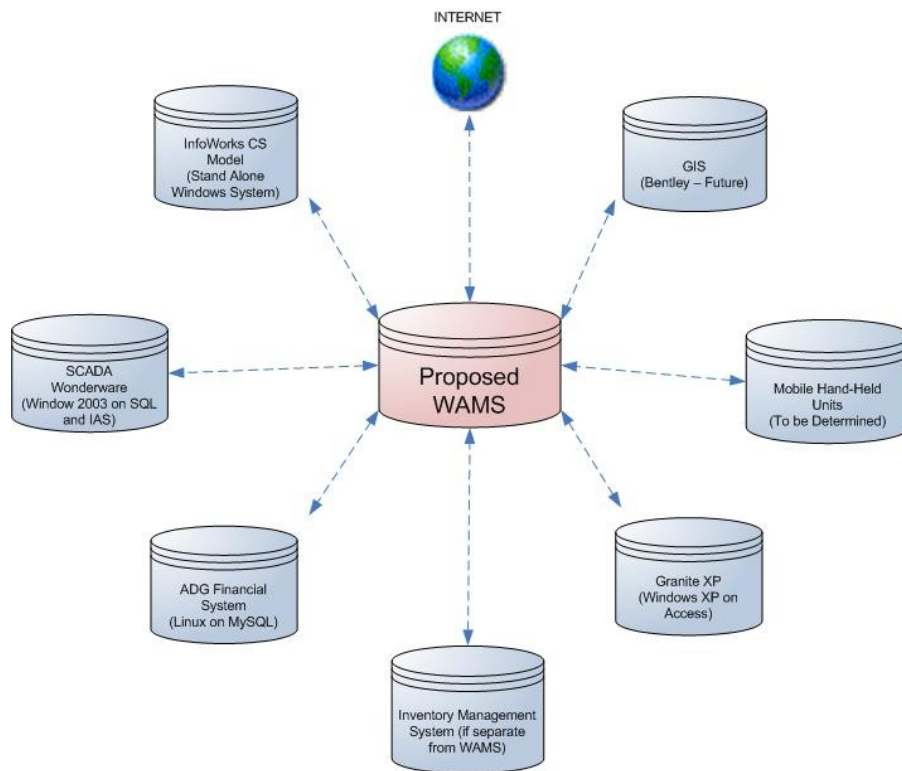


Figure 1 Required WAMS Interfaces

Work Management

The WAMS must be able to prioritize work and schedule work, efficiently allocate resources, and track planned and completed work.

Work Management Reports

The City will work with the Proposer to develop specific report, but at a minimum the system must be able to provide the following reports:

- Mean Time Between Failures
- Work Order Backlog
- Work Request History Summary
- Work Request History Detail
- Work Order History Summary
- Work Order History Detail
- Work Order Labor History Summary
- Work Order Labor History Detail
- Work Order Contracted Service Summary
- Work Order Contracted Service Detail
- ManPower Schedule Summary
- ManPower Schedule Detail
- Work Order Statistics
- Maintenance Status
- Equipment Replacement Schedule
- Equipment Downtime Details
- Spare Parts
- Purchase History Summary
- Purchase History Detail
- Inventory Received
- Stock Activity
- Inventory Value
- Inventory Item Usage
- Inventory Physical Count Form

Work/Service Request Evaluation and Approval

- Provides Automatic Notification and approval of work/service request and work orders.
- Tracks unscheduled (response) maintenance/repairs.

Work Planning and Scheduling

- Tracks predictive and scheduled (preventive) maintenance, based on work calendar events or runtime as appropriate.
- Issues and tracks work assignments or service requests and creates a maintenance history.

Work Orders

- Tracks Labor, Equipment and Materials.
- Transmits required data to and from GIS.
- Links Documents to Work Order.

Work Order Completion and Analysis

- Tracks inspection history on all infrastructure.
- Records and tracks Work Order history.
- Produces reports that identify problem areas, conditions of assets, maintenance costs, etc.
- Tracks costs for budget purposes and capital improvement (Projects) projections.
- Supports the following output options: screen display, HTML format, print to file, printer.

Asset Management

The WAMS must include a comprehensive asset management application or module that includes all assets maintained in the City's sanitary sewer system. The WAMS is to be configured to transmit asset information between the WAMS and GIS and must be able to accommodate a third party document management system that provides access to warranty documents, operation and maintenance (O&M) documentation, forms and drawings. The WAMS must have the ability to evaluate assets maintained and make estimates for planning future capital improvement projects as well as determining asset life cycle.

Asset Details and Tracking

- Displays sanitary sewer and reclaimed system assets and work orders in integrated, real-time GIS environment allowing any of the aforementioned analysis to take place spatially.
- Links associated documents and /or can interface with a document management system.

Warehouse Management

The WAMS must contain a module that retains stocked spare parts and materials data and manages current balances; reorder points, bin locations, associated vendor(s) and cost; monitor transactions and track the usage history of critical spare parts and materials; and integrate with hand held devices and bar coding technology for inventory transactions and auditing. If the WAMS does not have this module, the Proposer must supply a third party system.

Issue/Transfers/Returns

- Assigns resources from inventory to an asset, a Work Order, and to a specific crew and location.
- Ensure that requested materials and spare parts are readily available or can be obtained within an acceptable time period.
- Tracks inventory transaction activities.
- Removes a rotating asset from a location/return to inventory.

Inventory Audit

- Performs usage analysis and prioritizes items within the system.
- Interfaces with bar coding and hand held technology.

- Tracks changes to item current balance, location and cost.

Reorder Materials and Spare Parts

- Associates multiple vendors and manufactures with an item.
- Sets item reorder point and flag parts requiring reorder automatically.
- Automatically updates item current balance upon receipt of reordered items.

System Integration

The Proposer must propose all WAMS software components required for a successful installation of an integrated system and provide for ongoing operation.

System Implementation Plan - The Proposer shall prepare a System Implementation Plan that includes a detailed description of the following (except for the schedule):

Project Management Plan - The Proposer will submit a detailed plan showing how the project will be managed including key project team members in addition to the Project Manager. This plan will include any requirements that the Proposer has for the City or any expectations of the City Staff that is necessary to complete the system implementation.

The Proposer shall work with the City to develop an Asset Hierarchy and to organize assets within the Hierarchy.

The Proposer will be responsible for implementation planning, data and requirements gathering, and configuration. The Proposer will clearly document and define the architecture of the WAMS solution in the City's environment and will be used as the blueprint for system implementation.

System Implementation Schedule – The Proposer will submit a detailed System Implementation Schedule using Microsoft Project as part of the Project Management Plan. The Proposer shall provide a short narrative of each task as it relates to the project, including task that the Proposer expects the City to perform. The City requests an implementation period of 468 calendar days to allow sufficient time for City staff to participate in the process. A final System Implementation Plan will be mutually agreed between the successful Proposer and the City when a Proposer is selected. Proposer will provide a Milestone and Deliverable Acceptance process as part of the System Implementation Schedule as part of the final System Implementation Plan.

Data Security Plan – The Proposer will submit a data security plan to ensure that City of Largo's data or software systems will not be compromised during the implementation of this project.

Master Test Plan – The Proposer will certify, in writing, to the City that the software is installed and ready for testing and Go-Live. The City will have 90 days to notify the Proposer, in writing, of any specific deficiencies or issues with the system and will expect a resolution within 30 days of disclosure of the deficiency. City of Largo will expect the Proposer to perform the following test to their satisfaction. The Master Test Plan will be a compilation of two documents; the Integration Test Plan, and the Regression Test Plan:

Integration Test Plan - a description of how the system will be tested. It is to contain a checklist of all functions and their desired results. In any available case, test data should be described with the desired result, so that testing can verify that calculations and data manipulations are producing the desired results. This list will be used for functional testing of the system by the City.

Regression Test Plan - will be used if the project requires there to be modifications to any system already in-use by the City. Regression Testing must ensure that the changes to any affected systems do not impact the daily work of those that use them. The Regression Test Plan must be well defined and have to reach out to any User Group that interacts with the modified system

Data Migration Plan – City of Largo requires the services of the selected Proposer to extract data from existing data files and load the data into the WAMS, as necessary. The City will make available for review existing data files. Proposers shall review these files and factor their completeness and structure into the cost, schedule and approach for implementation. The Proposer will be required to submit a plan for migrating data from the City's legacy systems into the new WAMS systems. This plan should include time-frame, method of migration, recovery plan and data validation process.

The City will provide existing data to the Proposer in Excel format for the Wastewater Treatment Equipment. The Proposer will be responsible for migrating sanitary sewer collection system data from the existing ESRI GIS and Microstation databases.

The Proposer should assume that some manual data conversion will be required.

The City will provide one person from Engineering and one person from Environmental Services to assist with any additional asset information and data gathering efforts.

Change Management Procedure – The Proposer will submit Change Management Procedures to City of Largo that will describe the process the Proposer will follow in the event there is a change that will adversely impact the project.

Training/Education Plan - The Proposer must provide a training plan for the proposed WAMS solution. The plan must include user group levels, course duration, course description and any course prerequisites. Proposed training costs should include the costs of onsite training with a maximum class size of 10 students for hands-on classes. The Proposer will provide "Train the Trainer," "End User" and "Systems Training." All training will be conducted in the City.

Proposer will provide complete on-site training and curriculum for all software modules and products supplied to the City. The Proposer will configure and load all training materials and software on the databases and computers required for training.

Estimated Required User Training Student Count:

Sanitary Sewer Maintenance Staff	10
Wastewater Reclamation Facility Maintenance Staff	10
Warehouse – Purchasing Management Staff	3
Administration and Support Staff	5
IT System Administrators	5

System Cut-Over Plan – The Proposer must provide a cut-over plan for each new WAMS process solution. The Proposer should be sure to include the time required, department/staff affected, potential impacts to the affected departments/staff during the cut-over, and safeguards to prevent the loss of data if a problem is encountered during the cut-over.

System Implementation Services

The Proposer will provide services to implement a total solution as described in the Proposers System Implementation plan.

Installation Services

The WAMS system must be in accordance with the submitted System Implementation installation and implementation of the proposed solution. The Proposer must assist the City in establishing a team comprised of management, technical and user resources to be involved in the installation and implementation of the proposed systems and interfaces. The Proposer will provide all installation, configuration, integration and data migration services necessary for full implementation of the proposed solution.

Change Management Services

The Proposer will manage the Change Management Procedure and support City in its objective of having a "Zero Defect" system. The concept of "Zero Defect" mindset is to find and eliminate as many defects as possible within the system before it is delivered to the City Users. This process requires that the Proposer be dedicated to testing and reviewing all work before it is used by the City. All work produced by the Proposer must go through the Proposers Master Test Plan.

Technology Environment

The City of Largo's technology architecture is designed to be agile, open, and easily configured to address the changing business process needs of all City Departments. The standards are:

- Three unique centralized computer rooms - City, Environmental Services, and Library.
- Consist primarily of HP rack mounted Intel based servers utilizing various Linux OS distributions in a central computer room. Other server and OS manufacturers, such as Microsoft, Solaris, Dell and Mac, are incorporated into the network.
- The network is switched Ethernet, TCP/IP, integrating physical, virtual and wireless connectivity using 3Com, Cisco and Blue Socket devices. Single domains exist only in the Microsoft based segments. Fiber connects all buildings within one mile of City Hall, using wireless, cable, DSL, and high speed broad band to connect other buildings. Fiber is utilized within the major builds to connect wiring closets. Connectivity to the desktop is Cat 5e and Cat 6.
- Remote access connectivity is provided by Citrix and NX.
- Desktops consist of HP thin client devices running a small foot print Ubuntu OS.
- HP Network printers are utilized instead of desktop devices. The HP standard print driver is used.
- Enterprise productivity tools are OpenOffice, Evolution, and Firefox. All open source and proprietary applications must interface with these products. Limited licensing of other productivity tools exists.
- Oracle is the primary proprietary data base with the open source MySQL database being preferred. Other databases, such as PostGRES, Progress, SQL Server, DB and Access exist and are being phased out when possible. A NAS server is maintained as a repository for non-application data. All data is maintained on City servers, not on local hard drives.
- Application software is open source preferred or proprietary coded application software running on an open source platform utilizing either a browser or client server user interface. Client server must be thin client aware. Both application and client software run on host servers. Microsoft applications/clients must completely function with Citrix, Metaframe, or NX (no server) technology.
- If the application is browser-based, it must be able to run on Mozilla Firefox.

Product Offering

City of Largo is interested in pursuing proven product solutions that require a minimum level of modification. City of Largo will need to meet critical regulatory-based requirements with product modifications as required and will adapt the business to the product where necessary. The Proposer must identify all product modules required to support the proposed solution. The Proposer must identify if system source code is available.

The WAMS system must provide a flexible structure and development environment that will allow for system enhancements in a timely and cost effective manner. The Proposer must identify all product modules required to support the proposed solution.

Additionally, the proposer will provide documentation on how their product solution can be utilized in other City departments such as Public Works, Streets and Drainage, Parks and Recreation, Community Development, and Information Technology. This documentation must be representative of real usage, not proposed. Pricing for this additional functionality, if not included, must be provided.

The proposer will provide support for all third party software required for their solution if purchased as part of the award of contract.

The Proposer will provide the recommended/preferred hardware configuration components and third party software licensing in the proposal along with separate purchase pricing and annual support/maintenance pricing. At the City's option, procurement of non-product specific hardware, third party software licensing, OS, database licensing, training and support services may be acquired separately from this award of contract.

System Support Services

The Proposer will provide support services to the City during and after the deployment of the integrated system. The Proposer will maintain communications with, and provide the City an opportunity to comment on service, and report any problems with the system that has been used in a 'real world' fashion.

Training/Education Services - The Proposer will provide training plan for the proposed WAMS solution to the City users as described in the Proposers Training/Education Plan.

Ongoing Maintenance and Support -The Proposer must provide ongoing system support. The City defines ongoing support as: help desk support, system patches and regular system upgrades based on a defined ongoing maintenance fee.

Milestones and Deliverables

Milestones will be used to measure progress throughout the project. Pay requests will be made only after deliverables associated with each milestone have been accepted. Proposer must supply a Milestones and Deliverable Plan for the items listed below:

Implementation and integration of selected software and hardware.

The Vendor will prepare a System Implementation Plan consisting of the following which will be tracked as deliverables during the project:

- Project Management
- System Implementation Schedule (Critical Path) (bi-weekly updates required)
- Data Security Plan
- Master Test Plan
- Data Migration Plan
- Change Management Procedure
- Training/Education Plan

System Cut-over Plan Implementation and Largo acceptance of the WAMS module(s) and/or system(s) into the department's operational work flow - Fully functional WAMS to comply with Largo acceptance as agreed in the System Implementation Plan.

Implementation and Largo acceptance of the warehouse management module(s) and/or system(s) into City of Largo's operational work flows- Fully functional warehouse management system(s) to comply with Largo acceptance as agreed in the System Implementation Plan.

Implementation and Largo acceptance of new database(s) with all information converted. Fully functional database(s) to comply with Largo acceptance as agreed in the System Implementation Plan.

Population of database from existing and new sources. Quality control report to be present to Largo for final acceptance.

Definitions

In addition to any other terms that may be defined in this solicitation, the following terms have the following meaning:

Addendum – Revision to the RFP documents issued by the City prior to the receipt of proposals.

Agreement – refers to the executed contract between the City and Contracting Entity.

Offerer – the entity of individual submitting a proposal in response to this RFP.

Scope of Work – All the services specified, indicated, shown, or contemplated by the Contract, and furnishing by the Contractor of all materials, equipment, labor, methods, processes, construction and manufacturing materials and equipment, tools, supplies, power, water, transportation and other things necessary to complete such services in accordance with the Contract.

**CITY OF LARGO, FLORIDA
VENDOR INFORMATION FORM
FOR
WORK ASSET MANAGEMENT SYSTEM (WAMS)
RFP # 09-P-299**

The undersigned proposer does hereby agree to furnish the City of Largo, Florida, the items listed in accordance with the Specifications shown by the Invitation for Proposal to be delivered to the specified site for the price indicated.

**IT IS THE PROPOSERS RESPONSIBILITY TO CHECK THE WEBSITE www.largo.com
FOR FINAL DOCUMENTS AND ADDENDUMS BEFORE SUBMITTAL**

THIS PROPOSAL MUST BE SIGNED BY A PERSON AUTHORIZED TO ACT FOR THE COMPANY IN HIS/HER OWN NAME.

PROPOSER NAME:	_____
TAX ID# SSN or EIN:	_____
PROPOSER ADDRESS:	_____
PURCHASE ORDER ADDRESS:	_____
PHONE NUMBER:	_____
FAX NUMBER:	_____
COMPANY WEB SITE:	_____
COMPANY CONTACT (REP):	_____
EMAIL ADDRESS(REP):	_____
SIGNATURE:	_____

**CITY OF LARGO, FLORIDA
REFERENCE INFORMATION
FOR
RFP # 09-P-299**

Organization _____

Contact Person _____

Address _____

City _____ State _____ Zip _____

Phone Number (_____) _____

Project Cost _____ Date Performed _____

~~~~~

Organization \_\_\_\_\_

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number (\_\_\_\_\_) \_\_\_\_\_

Project Cost \_\_\_\_\_ Date Performed \_\_\_\_\_

~~~~~

Organization _____

Contact Person _____

Address _____

City _____ State _____ Zip _____

Phone Number (_____) _____

Project Cost _____ Date Performed _____

~~~~~

Organization \_\_\_\_\_

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

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone Number (\_\_\_\_\_) \_\_\_\_\_

Project Cost \_\_\_\_\_ Date Performed \_\_\_\_\_

~~~~~

Representative Typed Name/Title _____

Representative Signature _____

Firm _____

CITY OF LARGO, FLORIDA
INSURANCE REQUIREMENTS CHECKLIST
FOR 09-P-299
Items marked "X" must be provided

<u> X </u>	General Liability	Minimum Limits Required
	<u> x </u> Commercial General Liability	\$ <u>2,000,000</u> General Aggregate
	<u> x </u> Occurrence Form	\$ <u>1,000,000</u> Product/Completed Operations Agg.
	_____	\$ <u>1,000,000</u> Personal & Advertising Injury
	_____	\$ <u>1,000,000</u> Each Occurrence
	_____	\$ _____
<u> X </u>	Automobile Liability	
	Owned, Hired & Non-Owned	\$ <u>1,000,000</u> Combined Single Limit per Occurrence
<u> X </u>	Worker's Compensation and Employer's Liability	Statutory
		\$ <u>100,000</u> Each Accident
		\$ <u>500,000</u> Disease - Policy Limit
		\$ <u>100,000</u> Disease - Each employee
<u> X </u>	Professional Liability - Errors & Omissions	(*To be completed by Bidder)
	* Deductible: \$ _____	\$ _____ Aggregate
	* Claims Made (Y/N): _____	\$ _____ Each Claim
	* Occurrence (Y/N): _____	
	* Defense included in Limits (Y/N): _____	
_____	Builder's Risk - Installation Floater	(* To be completed by Bidder)
	* Flood Included \$ _____ Limit	\$ _____ 100% of Completed or Installed Value
	* Transportation Included \$ _____ Limit	All-Risk Form
	* Storage Included \$ _____ Limit	
	City Must Be A Named Insured. Copy of Policy Will Be Required.	
_____	Other	
	_____	\$ _____
	_____	\$ _____
<u> X </u>	The Certificate of Insurance must show "The City of Largo, elected officials and employees" as an additional insured.	
<u> X </u>	Certificated must give to the City of Largo 30 days' prior written notice of cancellation, non-renewal, or adverse change.	
<u> X </u>	Certificates must identify bid number and bid title.	

Subcontractors must carry the same Insurance limits.

Insurance Carriers should be A rated.

Statement of Bidder:

We understand the requirements requested and agree to comply fully.

Bidder - Authorized Signature

A complete copy of this form with original signature must accompany bid.

Request for Taxpayer Identification Number and Certification

Give form to the
requester. Do not
send to the IRS.

Print or type
See Specific Instructions on page 2.

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: ☐ Individual/Sole proprietor ☐ Corporation ☐ Partnership
☐ Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶
☐ Other (see instructions) ▶

☐ Exempt
payee

Address (number, street, and apt. or suite no.)

Requester's name and address (optional)

City, state, and ZIP code

List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number

or

Employer identification number

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign
Here

Signature of
U.S. person ▶

Date ▶

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,