

**ELECTRONIC**



**RFP # 2024-20**

**CITY OF NORTH PORT, FL**  
**ADVANCED WATER METER SYSTEM**

TYLER STARGEL  
Ferguson Waterworks – Meter & Automation  
P: (251) 223-9344  
E: TYLER.STARGEL1@FERGUSON.COM  
Local Address: 18305 Paulson Dr.  
Port Charlotte, FL 33954

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# TRANSMITTAL LETTER

Thank you for the opportunity to submit the accompanying response for the City of North Port Advanced Water Meter System RFP. Ferguson will be the prime material supplier, providing a comprehensive Neptune Cellular AMI solution consisting of MACH 10 ultrasonic water meters and R900 Cellular Endpoints. Neptune's FirstNet R900 Cellular solution supports a flexible, tailored AMI approach. With this easily deployable solution, the City of North Port can collect AMI meter data immediately while also reading your existing Neptune R900 system with the same software solution. This ensures a smooth transition to Cellular AMI without stranding assets that have been heavily invested in.

The City of North Port has been a Neptune customer since 1999 and has a fully deployed Neptune R900 AMR system. Although this relationship is 25 years old, the system is much younger due to diligent maintenance and investment by the City. Within the last 5 years, North Port has invested millions of dollars in the latest Neptune R900 endpoints and especially in large commercial MACH 10 ultrasonic water meters. The City has also recently invested in the Neptune 360 software solution which is the foundation for all Neptune AMR, AMI and Cellular endpoints. In short, the city already possesses the technology and software it needs to deploy a Neptune AMI solution, whether it be Cellular or R900.

Our team would like to have the opportunity to explore utilizing your current system in conjunction with data collectors to achieve your goal of AMI in the short term. It is a certainty that a large percentage of the system can be read with these assets, affording the City a significant cost savings from the start of the project. Acknowledging that the City wants to eventually move to a 100 % Cellular AMI system, any meters that cannot be read with this solution can be read with the Cellular endpoint solution.

Furthermore, any meter that reaches end of life can be replaced with cellular AMI technology, an option enabled by Neptune 360's ability to accept AMR and AMI readings simultaneously. We would create an upgrade program for any meters that fail under warranty so that all replacements coming back to the City of North Port are cellular as well.

We are certain that the City and the ratepayers would benefit greatly from getting full use of the millions of dollars spent thus far on the existing system, and we are confident that we can be the partner that helps you maximize that investment all while transitioning to a Cellular AMI system. We look forward to discussing this exciting project with the City and its staff.

Respectfully,

Tyler Stargel  
AMI Specialist  
Ferguson Waterworks

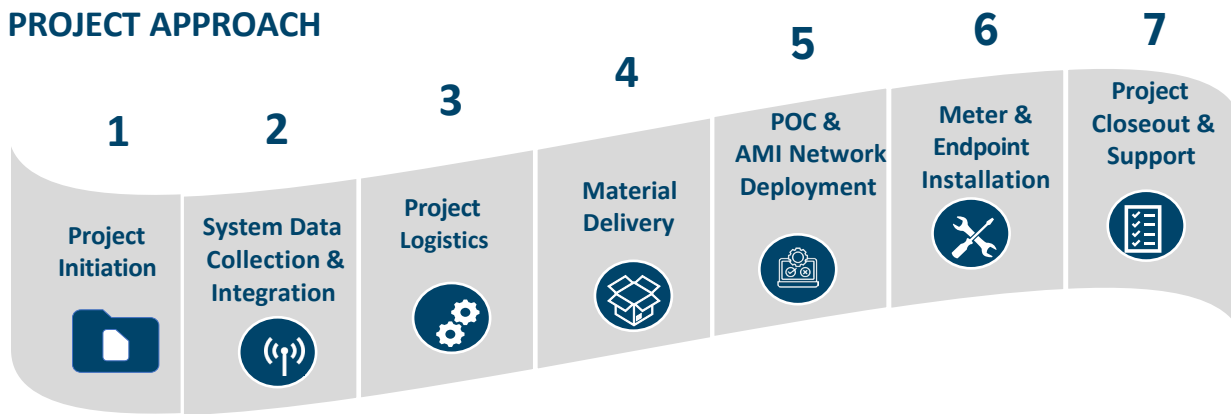
# DOCUMENTS

## PROJECT APPROACH AND TRAINING

- **Advantages of the Ferguson Partnership and Neptune System:**
  - **No New Software Integrations**
    - The Neptune 360 software is the same software the City is already using. All integrations are currently in place and functioning. The City will have access to additional reports and features that come with the AMI meter data. This is key to a smooth transition. **No other vendor can commit to this.**
  - **One reading platform for everything**
    - While the Cellular AMI system is being deployed, you will only need to read in one software. Any meters with Cellular endpoints will communicate to the Neptune 360 software for billing. All other meters can be read via AMR just as the City does now.
  - **Proven reliability**
    - As mentioned previously, Ferguson and Neptune have provided proven customer support and product reliability over the life of the AMR system.
  - **Unparalleled and easy to reach support**
    - Neptune and Ferguson have in-state support specialists and run support lines.
    - The Neptune 360 software has a built-in chat window to talk directly with a Neptune support specialist.
    - Multiple levels of support means the City will have on-demand support when needed.
  - **Migrate at your own pace**
    - If the City determines a full change-out is too costly, there are several options the City has to reduce the cost of the system.
      - New meters do not need to be replaced but can be retrofitted to read in the chosen AMI system.
      - The City can change out as much of the system as possible, continue reading the remaining meters AMR, and slowly change out the remaining meters over a longer period of time all while reading both the R900 and Cellular endpoints in the same software.

## PROJECT APPROACH AND TRAINING

### PROJECT APPROACH



**Project Initiation** – Ferguson’s Initiation process will host a series of Planning and Design workshops to establish a project plan. Following final negotiation and award of the contract, we will begin to work with the project’s key personnel to lay the groundwork for a successful deployment. We will define roles and responsibilities within the project team and create a clear chain of communication between all parties. Ferguson has developed comprehensive turn-key solutions for the deployment of your chosen solution. Next, we will plan weekly or bi-weekly project meetings/calls to review important updates and completion of tasks.

**System Data Collection and Integration** – We will collect all relevant meter and account information from the City’s billing provider to build the installation and scheduling database. We will scrub this data thoroughly to ensure we have an accurate baseline data set. This data will be used to establish our installation work order management, scheduling database, and data quality control mechanisms. Ferguson has a dedicated local integration and hardware support team that is available to quickly resolve any AMI integration, hardware activation, or field issues.

**Project Logistics** – Ferguson will work with key personnel to ensure all project aspects are considered. This includes workorder management setup, product staging and handling, waste disposal plan, production plan to align with billing cycles and holidays. Clearly setting responsibilities to ensure all project components are being addressed.



**Material Delivery** – Ferguson will plan out all deliveries for this project. A blanketed approach planned well ahead of schedule has helped execute our projects on time without delays. Deliveries will be communicated to the chosen installation contractor for storage and staging.

**POC & AMI Network Deployment** – Ferguson’s PM team serves as the singular point of contact through the AMI network deployment. Our team will work with the chosen meter installation contractor, aligning installation of the appropriate data collector locations with the City approved installation schedule. As testing progresses, the AMI network deployment will continue citywide increasing the coverage in anticipation of Acceptance. Having the AMI network fully established ahead of full deployment, allows the AMI data to flow seamlessly as meter installations progress.

**Meter & Endpoint Installation** – Ferguson’s team knows the key to a successful implementation is a well-trained and educated installation team. Ferguson will provide in-person field training for all key personnel involved with meter installations. Each training will be relevant to the audience and will include necessary product documentation and handouts.

**Project Closeout & Support** – As the full deployment phase ends, the project team will begin project closeout activities. A final contract review will be conducted. Additional education can be scheduled as needed to ensure the system is well understood by the City. A final system acceptance will occur to ensure a smooth transition during project close out and transfer to support.

Our Ferguson team will provide support, customer service, on-going system training, education, inventory management and assistance for the life of your AMI system.

- **Training** – Ensure that Training covers all aspects of system.
  - **Basic Overall Training** – Overview of Neptune® 360™ data management software.
  - **Customer Service Training** – Successfully navigate Neptune® 360™ and communicate the customer accounts.
  - **Billing Training** – Successfully import billing request file & export billing response file including readings on specified area.
  - **Field Mitigation Training** –
    - Mitigation of a meter not responding
    - Reading of a meter
    - Installation or swap of a meter
  - **Suggested SOP items**



We have developed a detailed project plan including all necessary resources to staff the project according to the City of North Port's RFP requirements and to ensure that we can provide the highest level of on-site or remote support and assistance. Training will be conducted throughout the life of the project. The specifics of which will be captured during the planning phase, gathering information from key stakeholders within the customer service, operations, management, and other organizations within the City's organization. A classroom schedule has been added to the overall schedule to ensure that specific formal settings are enacted to capture specific deliverables and specific core curriculum.



Final training will occur at the completion of the project to ensure all parties across the City are thoroughly trained on the installation, operation, and maintenance of the system, software, and components. Prior to the deployment of the meters another phase of training will occur with the education to operations. This will expand the knowledge to additional users beyond the champions on operational activities. Our philosophy is to “Educate to Operate” not simply train. Knowing how to navigate and operate a system gives the receiver an understanding of why and how the data is presented and the actions occur, not just how to push a button on the keyboard.

## FERGUSON BACKGROUND AND QUALIFICATIONS



**Largest Distributor**  
*Offering Customizable Solutions*



**36,000+**  
*Associates*



**\$29 Billion**  
*Annual sales in FY 2023*



**1,700+**  
*Locations*



**Over 1 Million**  
*Customers Worldwide*



**70**  
*Years of Operation*



**Publicly Traded**  
*Listed on NYSE & LSE*



**37,000**  
*Suppliers*



- **COMPANY LEGAL STRUCTURE:** Ferguson is a Limited Liability Company (LLC).
- **HEADQUARTER'S ADDRESS:** 751 Lakefront Commons, Newport News, VA 23606
- **FERGUSON'S FEDERAL TAX ID:** 54-1211771
- **FERGUSON'S D-U-N-S NUMBER:** 00-895-5171
- **E-VERIFY:** 1205487
- **VERIFICATION OF CURRENT BONDING CAPACITY:** Maximum amount of bond authorized to issue: \$50,000,000 Single \$200,000,000 Aggregate.
- **BANK REFERENCE:** Bank of America Acct: 3752290835 for all inquiries please visit [www.bankvod.com](http://www.bankvod.com)



## MANUFACTURER QUALIFICATIONS – NEPTUNE TECHNOLOGY GROUP

Neptune is an AMR/AMI systems vendor with a successful history for **130 years**. As a leading provider of meter reading systems and water measurement products, Neptune has continually focused on the evolving needs of water utilities – revenue optimization, operational efficiencies, and improved customer service. Our vision is to be viewed as the **most valued partner** of our utility customers and help them manage the world's scarce water, energy, and human funding resources.



Neptune's fully integrated manufacturing facility ensures dependable and dedicated support for all hardware, software, and support for Advanced Meter Reading (AMR) and Advanced Metering infrastructure (AMI) systems. All Neptune water meters meet or exceed American Water Works Association standards as well as all the revised requirements of the Safe Drinking Water Act (SDWA). Accurate meter readings are guaranteed with Neptune's absolute encoder technology — a field-proven meter reading concept first introduced in 1964. This solid foundation allows a seamless migration from manual data collection to handheld, mobile, fixed network, and cellular AMI systems. Neptune's migration approach means you'll never outgrow Neptune technology.

Neptune has approximately 700 employees in North America producing meter reading systems and water measurement products. Neptune's state-of-the-art, ISO9001-certified, 300,000-square-foot facility in Tallassee, Alabama houses our integrated manufacturing, engineering, and 100% lead-free foundry (the only of its kind in the industry). Additionally, Neptune opened its Atlanta based Innovation Center in the spring of 2017 with a focus on software and hardware development, including IT support.



## RESUMES FOR KEY PERSONNEL

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### **Jeff Kimbrough - Florida Sales Manager**

Jeff began his career in the water utility supply business in 1984 testing and repairing water meters and has spent his entire 40-year career in the sales and support of water meters and advanced meter reading system solutions. In 1987, he became Sales Territory Manager for Sunstate Meter & Supply where he began working all water utilities within the Central Florida area. Jeff remained in this position until he assumed the position of Vice President of Sales for the State of Florida in 2019. Throughout his long career, Jeff has participated in the sale, implementation, and service of over 100+ AMR & AMI water meter reading systems. Jeff is a graduate of Santa Fe State College where he received a degree in Business Management & Marketing.

### **Tyler Stargel - AMI Specialist**

Tyler began his career with Neptune Technology Group in 2015. He gained an expert-level knowledge of the Neptune product line and has a firm understanding of the market and strategy for deploying AMR/AMI systems. In 2018, Tyler joined Ferguson Waterworks in Iowa as an AMI specialist. In 2022, Tyler was selected as the AMI specialist for western Florida, where he provides customers with the highest level of service and support for their metering systems.

### **Adam Breer - Manager, Project Management**

Adam Breer is a water meter industry professional with over eight years of experience. He has been directly involved in over 114 AMI and AMR projects and more than 350,000 water meter installations Adam has held various positions at Ferguson Waterworks during his career and now brings his expertise as the Manager of Project Management for our Meter and Installation Group. He is responsible for a team of AMI Project Managers across 12 states and managed the nations largest remote disconnect meter project. Adam has also worked as a Project Manager, Data Project Manager, and Project Management Coordinator during his time with Ferguson Waterworks. He ensures the success of projects by assisting the sales and project management teams to meet customer expectations.

### **Cosie Sawyer - Integration Specialist**

Cosie has extensive metering experience after working in local government utility billing for over 16 years. During an AMI implementation at the Town of Cary, NC, she brought great value as a Customer Service Representative, Utility Billing Technician, and eventually as Utility Billing Supervisor. She's intimately familiar with utility billing practices, rate structures, local government practices, small business practices, workflow management, and customer service. She has already worked extensively with the City of North Port on the integration of the Neptune 360 cloud based software solution with the City's existing Utility Billing software. Cosie now resides in Clearwater, Florida and is working as an Integration Specialist for Ferguson's Neptune Support team.

### **Cody Jennings - Manager, Information Technology**

Cody Jennings has worked in the telecommunication industry for 9 years, training customer service, customer support, and resolving escalated issues. 5 of those years were at Neptune, learning the different data collection options and best practices to have a well-maintained AMR/AMI system. During Cody's tenure at Neptune, they released increasingly complicated systems and identified how to transition customers using older technology to the latest and greatest offerings. Cody joined Ferguson in 2021 and transitioned to the IT Manager role for our Integration team.

## PRICING & AVAILABILITY

Meters	Unit Price
5/8"x3/4" MACH10 w/Neptune Quick Lock	\$ 215.00
1" MACH 10w/Neptune Quick Lock	\$ 294.00
1 1/2" MACH10 w/Neptune Quick Lock	\$ 758.00
2" MACH10 w/Neptune Quick Lock	\$ 920.00
3" MACH10 w/Neptune Quick Lock	\$2,780.00
4" MACH10 w/Neptune Quick Lock	\$3,620.00
6" MACH10 w/Neptune Quick Lock	\$6,020.00
Endpoints	Unit Price
R900 Cellular Endpoint w/ Neptune Quick Lock	\$ 173.50
Cellular AMI Solution	Unit Price
Software, Network, and Maintenance Services	\$ 13.94

### Cellular AMI Solution

- **Software Services** - Neptune 360 and My 360 Customer Portal Annual Subscription
- **Network Services** - Cellular Data Plan Annual Subscription
- **Maintenance Services** - Maintenance Required to Uphold System Standards and Expectations

- Section 1.03 of the Scope of Service of the RFP reads: **"A starting point of 250 meters+ endpoints of 5/8"x3/4" delivered to us monthly within 1 months of agreeing to proceed. Depending on available funding, we would like the capability to scale up to 800 meters and endpoints per month within a reasonable lead time."**
  - We are pleased to confirm that this is no problem for Ferguson Waterworks and Neptune Technology Group. 5/8"x3/4" MACH 10 Ultrasonic Meter and Neptune R900 Cellular Endpoint current lead times allow us to commit to this delivery schedule with no concern or foreseeable complications.

# STRENGTH OF PROPOSER



# 1

## City of Cape Coral - Neptune R900 AMI

### Description of Project

The City of Cape Coral began purchasing Neptune T10 water meters in 1999. Over the past 25 years, the City has utilized Neptune's newest technology offerings to enhance their system, much like the City of North Port. They had a goal to migrate to an Advanced Metering Infrastructure (AMI) system, being careful not to strand the assets they had invested millions of dollars in during the transition. In 2018, they decided to make the transition to Neptune's newest R900 AMI product offering to begin building an AMI system tailored to their own needs and at their own pace. Because of Neptune's "backward compatibility, forward migratability" commitment, they are able to read their legacy R900 endpoints via AMR while concurrently deploying the R900 AMI endpoint under their AMI network. To date, they've installed north of 60,000 AMI endpoints inside and outside of the existing network coverage area to proactively build-out the installed base of AMI endpoints. They are averaging 60,000 received AMI readings every 24-hour period from an AMI network that consists of (4) data collectors. The project is ongoing as they convert their existing service area as well as acquire new service area through the Utility Expansion Program (UEP).

### Point of Contact

Holly Goyette - Assessment and Billing Manager, Phone - (239) 242-3889, Email - hgoyette@capecoral.gov

Al Casing - Distribution Manager, Phone - (239) 574-0857, Email - acasing@capecoral.gov

### Relevance to this Project

Like North Port, Cape Coral is a long-time partner of Ferguson Waterworks and Neptune. An innovative product offering from Neptune and a consultative approach from the Ferguson Meter and Automation Group have allowed Cape Coral to deploy an AMI network at their own pace and tailored to their needs. Ferguson managed lead time challenges in a post-covid environment better than anyone in the industry, giving Cape Coral a peace of mind that blanket orders were scheduled and material was stocked in their warehouse.

## 2

### **City of Margate - Neptune R900 Cellular AMI**

#### **Description of Project**

In 2023, the City of Margate was struggling with their existing meter reading system provided by a different manufacturer. The Meter and Automation Group at Ferguson took a consultative approach with the City and created a staged migration project towards a Neptune R900 Cellular AMI system, including turnkey installation and project management. To date, ~10,000 R900 Cellular endpoints are deployed with project completion targeted for November 2024.

#### **Point of Contact**

Marta Reczko - Assistant Utility Director, Phone - (615) 585-1994, Email - mreczko@margatefl.com

#### **Relevance to this Project**

The City of Margate is our newest cellular AMI system deployed to date and of a similar size to the City of North Port at 17,000 total endpoints. The project is turnkey and structured in a similar fashion to what we are proposing for this project.

### 3

#### **Town and Country Utility (Babcock Ranch) - Neptune R900 AMI**

##### **Description of Project**

In 2019, Town & Country Utility was struggling with their AMI system efforts, having deployed systems from two different manufacturers with little success. Babcock Ranch is a development with big aspirations and an aggressive growth strategy, and the utility needed a reliable means of acquiring billable reads as efficiently as possible. They approached our Meter and Automation Group looking for an AMI solution that was both reliable and sustainable for the long term. They deployed an initial AMI network of three data collectors to read roughly 2,000 new services. Today, they are reading 5,500 endpoints with the same initial three data collectors they started with. The development is projected to reach 20,000+ endpoints at full build-out. Our AMI system deployment team actively works with the utility to assess current network coverage and future demand. We stock meters and endpoints locally for the utility to negate any lead time concerns. For Town & Country, the success of the Neptune AMI system is two fold: (1) It works reliably and consistently, and (2) the system design allows for them to deploy additional infrastructure on their own timeline. Because, the Neptune R900 endpoint always transmits an AMR message, they can collect readings at all times. The Neptune AMI system also allows for cellular endpoint deployment should they choose to do so.

##### **Point of Contact**

Jon Meyer - Utilities Director, Phone - (941) 235-6900, Email - [jmeyer@tcufl.com](mailto:jmeyer@tcufl.com)

##### **Relevance to this Project**

Town and Country Utility is utilizing the same R900 technology in their AMI system that the City of North Port owns today. This speaks to the ability of the City of North Port to maximize their investment in the current Neptune R900 system to migrate to AMI. This is crucial as it will allow the City to deploy an AMI system efficiently and as cost effective as possible, all while planning for a migration to Cellular AMI on the same timeline.

## 4

### Town of Lake Placid - Neptune R900/Cellular AMI

#### Description of Project

In 2022, the Town of Lake Placid was still reading all of their 4,500 meters manually. Through consultative discussions with the Utilities Director, our Ferguson Meter and Automation Group crafted a tailored solution to address the needs of Lake Placid. The first step was to on-board the utility to the Neptune 360 cloud-based platform. This allowed meter readers to gather readings more efficiently and unlocked the ability for Lake Placid to move forward with AMI deployment. Because of their unique geographical layout along the Lake Wales Ridge, Lake Placid opted to deploy Neptune R900 AMI and Cellular AMI endpoints concurrently to address their service area and maximize the investment. Today, they have ~500 R900 Cellular AMI endpoints deployed in their outlying areas and are in the process of installing one data collector in the center of town to read their concentrated areas.

#### Point of Contact

Kevin McCarthy - Utilities Director, Phone - (863) 699-3747, Email - [lputilities@mylakeplacid.org](mailto:lputilities@mylakeplacid.org)

#### Relevance to this Project

This project is a great example of the flexibility that Neptune offers for AMI deployment. Lake Placid is utilizing the Neptune R900 endpoint that is already 100% deployed at the City of North Port PLUS the Neptune Cellular endpoint to drive an AMI solution that is most economical and efficient for them. We believe the City of North Port could take a similar approach to on-board onto an AMI system very rapidly and exponentially more cost effective, all while having an end goal to transition to a full cellular deployment.



## 5

### **Manatee County - Neptune R900 AMR and R900 Cellular**

#### **Description of Project**

Manatee County Utilities has been a longtime customer of Ferguson Waterworks and Neptune Technology Group with a relationship going back over 20 years. In the mid-2000's, Manatee County began deploying Neptune R900 endpoints to increase operational efficiencies. Today, they have installed more than 80,000 Neptune R900 endpoints in a system that comprises roughly 145,000 services. They have also deployed Neptune R900 Cellular endpoints strategically on commercial and industrial meters as well as interconnect meters at surrounding utilities they supply water to. Thus, they are able to capture manual, AMR, and Cellular AMI readings under one software solution, Neptune 360. As Manatee County looks to the future, they are evaluating whether to migrate full scale to AMI. They are enabled to do so knowing their investment in the 80,00 R900 endpoints deployed is secure and can utilize the Neptune R900 Cellular endpoint to realize a full scale hybrid AMI solution.

#### **Point of Contact**

Matt Vanlandingham - Meter Superintendent, Phone - (941) 290-8922, Email - [matt.vanlandingham@mymanatee.org](mailto:matt.vanlandingham@mymanatee.org)

#### **Relevance to this Project**

Like North Port, Manatee County Utilities is significantly invested in the Neptune R900 system. The success such a large utility has had with a Neptune R900 system speaks to the reliability and flexibility of the technology. Furthermore, knowing they can use their existing investment to transition to AMI without stranding assets is crucial to the long-term health of the utility both financially and operationally.

# REFERENCES

## PROJECT REFERENCES

### City of Margate, FL

901 NW 66th Ave., Suite A, Margate, FL 33063

**Contact:** Ms. Marta Reczko

**Phone:** (615) 585-1994

**Email:** mreczko@margatefl.com

**Project Description:** 17,000 endpoints, 10,000 R900 Cellular endpoints deployed to date.

Project completion estimated 11/24. Utilizing National Metering Services as installation partner.

### City of Cape Coral, FL

1015 Cultural Park Boulevard Cape Coral, FL 33990

**Contact:** Ms. Holly Goyette, Assessment and Billing Manager

**Phone:** (239) 242-3889

**Email:** hgoyette@capecoral.gov

**Project Description:** 75,000 Endpoints, 80% deployed IOT AMI solution, 100% Neptune R900 deployed.

### Athens-Clarke County, GA

124 E Hancock Ave, Athens, GA 30601

**Contact:** Mr. Jim Kethley

**Phone:** (706) 613-3479

**Email:** james.kethley@athensclarkecounty.com

**Project Description:** 60,000 endpoints, early phases of a multi-year project. Installed 6,000 R900 cellular to date.

### VA American Water - Alexandria

2223 Duke St, Alexandria, VA 22314

**Contact:** Chris Long

**Phone:** (703) 946-2223

**Email:** chris.long@amwater.com

**Project Description:** 58,000 endpoints, 29,000 R900 cellular installed to date. Multi-year project

# LITIGATION AND INSURANCE



## TAB 5 – LITIGATION AND INSURANCE

Ferguson is a relationship focused business. It employs approximately 36,000 associates in over 1,700 locations throughout the United States. Given its size and scale, it regularly engages in litigation as either a plaintiff or a defendant in the ordinary course of business. However, there is no current claim or litigation that will have a material impact on its ability to perform the requirements of any prospective contract.

A copy of insurance certificate is included in Tab 11: City Required Forms

# RISK MITIGATION

## First Net & Maintenance-as-a-Service

- **Risk Mitigation with the Neptune R900 Cellular endpoint:**
  - **Only Cellular Endpoint on FirstNet:**
    - Our solution is the only Cellular endpoint on the FirstNet network, providing enhanced security, protection from network congestion, data prioritization, and most importantly, **risk mitigation**.
    - FirstNet is the nationwide public safety broadband platform dedicated to First Responders and those that support them. After the events of 9/11, the United States government recommended the establishment of a nationwide broadband network to bolster communication system strength and security. AT&T was awarded a 25-year contract in 2017 with the U.S. Government to support FirstNet.
  - **FirstNet is a network that will last the life of your system:**
    - Cellular AMI technology has a history of being impacted by carrier sunsetting of cellular bands, **specifically with our competitors' offerings**.
    - There are 20 years remaining on the FirstNet contract, meaning the network will be maintained for the life of your AMI endpoints. This negates any risk associated with network availability when deploying a Neptune R900 Cellular AMI system.
  - **Benefits for the City of North Port:**
    - Data prioritization over commercial traffic
    - Enhanced cybersecurity
    - Protection from network congestion
    - Dedicated network resources during disaster recovery (hurricanes)
- **Risk Mitigation with Maintenance-as-a-Service**
  - Ferguson Waterworks is prepared to offer an innovative solution, bundled with the overall scope of the Cellular AMI solution, to reduce risk to near zero.
    - Ferguson Waterworks, and by extension any sub-consultant used to deliver the solution, will provide ongoing maintenance of the AMI system and MDM at no additional cost to the City for a defined period agreed upon by the City and Ferguson Waterworks.
    - This includes any and all work necessary to restore AMI system to required 99.5% performance reporting as outlined in the Scope of Services

# DATA COLLECTION PERFORMANCE

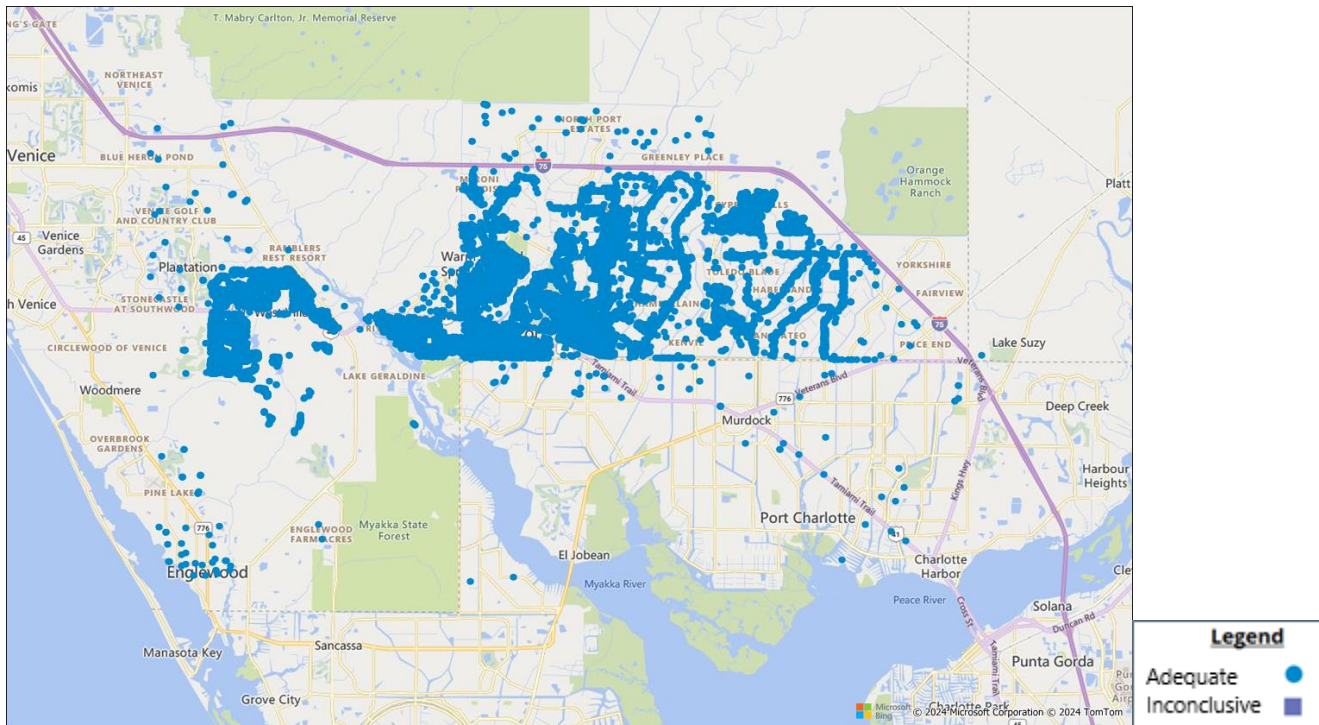


# R900 Cellular Coverage Analysis

<b>Customer Name:</b>	North Port, FL
<b>Report Date:</b>	March 11, 2024
<b>Revision:</b>	1

## Cellular Coverage Analysis Data:

From location information provided by the North Port, FL, a request was submitted to Neptune's cellular carrier partners to confirm LTE-M coverage. The map below represents the results provided by the carriers.



## Carrier Results Summary:

The coverage analysis indicates that there is adequate cellular coverage for 100% of the evaluated locations to support a deployment of Neptune's R900 cellular endpoints.

Total population size: 26,849

- 8,920 of 26,849 locations could not be evaluated due to invalid coordinates.
- 100.00% (17,929 of 17,929 locations) are expected to have adequate coverage.
  - 17,346 of the 17,929 support the deployment of Neptune's FirstNet cellular endpoint.
  - 583 of the 17,929 support the deployment of Neptune's Verizon cellular endpoint.
- 0.00% (0 of 17,929 locations) are inconclusive.

# WATER METER

## PROPOSED METERS

### NEPTUNE MACH 10® ULTRASONIC METER

For your project, we are offering the MACH 10® Ultrasonic Meter available in 5/8-12" sizes. The MACH 10 Solid State Ultrasonic water meter features no moving parts, ensuring continued accuracy and performance over the life of the meter and maximum revenue generation from your metering program. Its high-resolution measurement allows you to accurately capture extremely low flow rates, while a rugged, lead-free bronze main case adds to its long-term performance.



*MACH 10® Small  
(5/8", 3/4", and 1")*



*MACH 10®  
Intermediate  
1 1/2" and 2"*



*MACH 10® Large  
3" through 12"*

### MACH 10® SOLID STATE ULTRASONIC WATER METER

#### Key Features

- 5/8" - 1" sizes provides temperature and pressure data to enable proactive infrastructure monitoring
- MACH10 Switch Remote Shutoff Solution currently in development
- Available in sizes: 5/8", 3/4", 1", 1-1/2", 2", 3", 4", 6", 8", 10", 12"
- UL listed and FM approved
- 8-digit remote meter reading
- Advanced flags: leak, reverse flow, excessive forward flow, and low battery detection
- Maintenance-free
- IP-68 rated, fully potted electronics and battery for submersion in flooded meter pits
- Long-life lithium battery with capacitor
- Ideal for combined potable and residential fire service applications
- 20-year battery life for residential sizes

# CUSTOMER PORTAL



# Support Customer Service and Water Conservation Efforts

## Neptune® My360™ Consumer Portal



Enhance utility customer service and operational efficiency by providing consumers with a convenient, proactive way to monitor their own water consumption 24/7. Users no longer have to wait for a bill to detect possible issues, which means less water lost and fewer high bill complaints.

Users can set water thresholds and out-of-town alerts for greater peace of mind. And water conservation is encouraged when consumers can see how much they actually use with easy-to-read charts and graphs.

Neptune My360 is web-based to work on all devices and is always up-to-date. Get up and running quickly without the need for complex integrations.

- Easily customize to utility branding
- Visibility into consumer portal usage and adoption
- Self-service access to consumer data reduces customer calls and high bill complaints
- Responsive design works on desktop, laptop, tablet, and mobile devices
- Intuitive dashboard that highlights potential issues faster

# ENDPOINT FUNCTIONALITY AND RELIABILITY

## NEPTUNE R900® CELLULAR ENDPOINT



Neptune's Cellular endpoint is part of Neptune's portfolio of "Managed Services" products designed to reduce the network infrastructure investment that utilities face when establishing and migrating to AMI networks. **The deployment of Cellular endpoints allows utilities to leverage the coverage of the FirstNet® Cellular network throughout the service territory with no operational burden.**

### *R900® Cellular Endpoint*

Through its innovative design and the Neptune® 360™ head-end platform, the Cellular endpoint supports both AMI and back-up mobile AMR meter reading without any reprogramming of the endpoint. The R900® Cellular endpoint interrogates the meter register for consumption and event data, such as reverse flow and continuous leak detection events, every 15-minutes and transmits the data via the FirstNet® Cellular network to the Neptune 360 head-end system at a default setting of every 6 hours.

It is a two-way communication device allowing for remote firmware updates to provide its users with future product enhancements and functionality. Business continuity is ensured with the endpoints 96 days of storage and automatic backfill functionality. The R900 Cellular endpoint is easy to install with no programming required. A magnet swipe across the endpoint's housing is the only thing required to activate the device. Installation and Cellular signal quality can be quickly verified with the Neptune 360 Field Manager app that is compatible with both Android and iOS devices. location. The Field Manager app is not required for endpoint installation, but it is useful to verify a valid meter reading and good Cellular network connectivity at the installation location. The app replaces the need for the utility to purchase and maintain any special handheld programming devices and is provided to all our utility customers at no charge.

Neptune's R900 Cellular endpoint has a single mode of operation transmitting over the FirstNet Cellular network at predetermined intervals. This single mode of operation ensures that there is no opportunity for human error in the configuration and programming of the endpoint during installation. Additionally, the endpoint has a consistent and predictable battery life ensuring its operation for 20-years. From the factory the endpoint is active and transmitting at predetermined transmission intervals for operation on a Cellular network to provide time synchronized 15-minute meter reading data as well as a backup mobile reading method.

Neptune's R900 Cellular endpoint will enable the City to leverage the FirstNet LTE-M Cellular network to provide reliable connectivity for meter reading data and alerts across its large service territory. Neptune's Cellular endpoint is available in pit and wall form factors to support deployment in pits, vaults, walls, and poles.

The Neptune R900 Cellular endpoint can be ordered with a Neptune Quick-Lock Connector. The Quick-Lock Connector offers confidence in the field with a superior, secure locking connection. This maximizes ease of connection to the meter with no wire splicing and can be provided with long lengths upon request.

# CITY REQUIRED FORMS





## REQUIREMENTS and method of submittal

**TAB 11 CITY REQUIRED FORMS** – This checklist is provided to assist each Proposer in the preparation of their response. Included in this checklist are important requirements, which are the responsibility of each Proposer to submit to make their response fully compliant. It is the responsibility of each Proposer to read and comply with the solicitation in its entirety.

**REQUIRED SUBMITTAL FORMS:** Provide fully executed forms.

- ☒ **ATTACHMENT 1:** Proposal Submittal Signature Form
- ☒ **ATTACHMENT 2:** Statement of Organization
- ☒ **ATTACHMENT 3:** References – Consultant is to contact the references and advise his/her references that the City will be sending an e-mail and reference form which needs to be completed and e-mailed back to the City in a timely manner.
- ☒ **ATTACHMENT 4:** Drug-Free Workplace
- ☒ **ATTACHMENT 5:** Public Entity Crime Information
- ☒ **ATTACHMENT 6:** Non-Collusive Affidavit
- ☒ **ATTACHMENT 7:** Lobbying Certification
- ☒ **ATTACHMENT 8:** Conflict of Interest Form
- ☒ **ATTACHMENT 9:** Disclosure Form (Consultant/Engineer/Architect)
- ☒ **ATTACHMENT 10:** Scrutinized Company Certificate
- ☒ **ATTACHMENT 11:** Vendor's Certification For E-Verify System

\*Note: See City Insurance Requirements (see levels of coverage) and Indemnification in the Contract

☒ **SAMPLE INSURANCE CERTIFICATE:** Demonstrate your firm's ability to comply with insurance requirements. Provide a previous certificate or other evidence listing the Insurance Companies names for both Professional Liability and General Liability and the dollar amounts of the coverage.

☐ **MBE/WBE/VBE:** If claiming either Minority Business Enterprise/Women Business Enterprises/Veteran Business Enterprise, the Prime Firm (not sub-consultant) **shall be** certified as a Minority Business Enterprise by the State of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes.

☐ **YES, CLAIMING STATUS AS PRIME ONLY**

☐ **YES, I'VE ATTACHED THE CERTIFICATE OF MBE/WBE STATUS FROM STATE OF FLORIDA AS OUTLINED SECTION 1.**

☒ **NOT CLAIMING MBE/WBE /VBE**

If claiming Minority Business Enterprise/Women Business Enterprises, the Prime Firm (not sub-Contractor) shall be certified as a Minority Business Enterprise by the State of Florida, Department of Management Services, Office of Supplier Diversity pursuant to Section 287.0943, Florida Statutes and the Certificate from the State of Florida shall be submitted with the required paperwork.

**LOCAL BUSINESS STATUS:** If Proposer affirms that it is a local business or North Port local business as defined in Ordinance 2009-10, then either the Affidavit Claiming Status as a Local Business, or the Affidavit Claiming Status as a North Port Local Business, which are included as a part of this proposal package, must be completed and returned.

- ☐ Yes, our business qualifies as a "Local Business" and has completed and attached the 'Affidavit Claiming Status as a Local Business' as a part of our submission (Complete Affidavit).
- ☐ Yes, our business qualifies as a North Port Local Business and has completed and attached the 'Affidavit Claiming Status as a North Port Local Business' as a part of our submission (Complete Affidavit).
- ☒ No, our business does not qualify as a Local Business or North Port Local Business.

PLEASE INITIAL AND RETURN WITH YOUR PROPOSAL.

*MM*

INITIALS

THIS PAGE MUST BE COMPLETED AND SUBMITTED

**METHOD OF SUBMITTAL:**

1. **NUMBER OF SUBMITTAL PACKAGES:** One (1) original hard-copy **UNBOUND** (marked "ORIGINAL") and signed in blue ink. **NUMBER OF COPIES:** four (4) hard copies **BOUND** (marked "COPY").  
(1original + 4 copies = 5 total submittals).

2. **NUMBER OF PAGES:** The proposal shall not exceed (20) pages (one-sided) in length. *(The Title Page, City Required Forms, 330 Form, resumes and tabs do not count towards the TOTAL NUMBER OF PAGES.)*

When compiling a response, sections should be tabbed and labeled. Pages should be sequentially numbered at the bottom of the page. Hard copy Proposals should be bound to allow flat stacking for easy storage. Do not use three ring binders of any kind. Sections should be compiled in the sequence listed above.

Place Proposal with all the required items in a sealed envelope clearly marked for specification number, project name, name of Proposer, and due date and time.

3. **PAPER/FONT SIZE:** LETTER SIZE: 8.5"x11" /FONT SIZE: Calibri 11, PDF FORMAT.
4. **USB FLASH DRIVE:** One (1) electronic version as a Portable Document Format (PDF) **on** a USB Drive containing the entire submittal. **CDs will not be accepted.**
5. Submit Sealed Proposal Package with the Following Information Clearly Marked on the Outside Packaging:

**SUBMIT TO:**

City of North Port  
Finance Department - Purchasing Division  
Geoff Thomas Contract Administrator I  
4970 City Hall, 3 RD Floor, Suite 337  
North Port, Florida 34286  
RFP NO. 2024-20 ADVANCED WATER METER SYSTEM

## ATTACHMENT 1 – PROPOSAL SUBMITTAL SIGNATURE FORM

The undersigned attests to his/her authority to submit this proposal and to bind the firm herein named to perform as per Agreement if the firm is awarded the Agreement by the City.

The undersigned further certifies that he/she has read the Request for Proposal, Terms and Conditions, Insurance Requirements and any other documentation relating to this request and this proposal is submitted with full knowledge and understanding of the requirements and time constraints noted herein.

As addenda are considered binding as if contained in the original specifications, it is critical that the firm acknowledge receipt of same. The submittal may be considered void if receipt of an addendum is not acknowledged.

Addendum No. 1 Dated March 5, 2024 Addendum No.        Dated         
Addendum No. 2 Dated March 11, 2024 Addendum No.        Dated         
Addendum No. 3 Dated March 12, 2024 Addendum No.        Dated       

Company Name Ferguson Enterprises, LLC dba Ferguson Waterworks

Telephone # (239) 850 - 7486 E-Mail mark.mcfalls@ferguson.com Fax # (941) 627-3519

Main Office Address 751 Lakefront Commons

City Newport News State VA Zip Code 23606

Address of Office Servicing City of North Port, if different than above: SAME AS ABOVE

Office Address 18305 Paulson Dr.

City Port Charlotte State FL Zip Code 33954

Telephone # (239) 850 - 7486 E-mail mark.mcfalls@ferguson.com Fax # (941) 627-3519

Name & Title of Firm Representative Mark McFalls, General Manager

Signature  Date MARCH 15<sup>TH</sup> 2024

Do you accept Visa? ☒ YES ☐ NO

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**

## ATTACHMENT 2 – STATEMENT OF ORGANIZATION

The following information will be provided to the City of North Port for incorporation in legal documents. It is, therefore, vital all information is accurate and complete. Please be certain all spelling, and capitalization is exactly as registered with the state or federal government.

Name of Respondent: Ferguson Enterprises, LLC

DBA (if any): Ferguson Waterworks

**Type of Entity** (Sole Proprietor, Corporation, LLC, LLP, Partnership, etc.): LLC

**Business Address:** 751 Lakefront Commons, Newport News, VA 23606

Phone: (239) 850 - 7486 Fax: (941) 627-3519

E-Mail [mark.mcfalls@ferguson.com](mailto:mark.mcfalls@ferguson.com)

Print Name and Title of person authorized to bind: Mark McFalls, General Manager

Federal Identification Number: 54-1211771

Signature: 

Respondent shall submit proof that it is authorized to do business in the State of Florida unless registration is not required by law.

Is this a Florida Corporation:            Yes      or        ✓   No

<b>If not a Florida Corporation,</b>	
In what state was it created:	Virginia
Name as spelled in that State:	Ferguson Enterprises, LLC

What kind of corporation is it: ✓ "For Profit" or        "Not for Profit"

Is it in good standing: ✓ Yes or    No  
 Authorized to transact business. ✓ Yes or    No  
 in Florida: ✓ Yes or    No

\*Documents provided.

State of Florida Department of State Certificate of Authority Document No.:

Does it use a registered fictitious name:        Yes      or      ✓ No

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.**



Names of Officers: President: Kevin M. Murphy Secretary: Eric A. Gallo  
Vice President: Ian T. Graham Treasurer: Brenda L. Crowder  
Director: William S. Brundage Director: Chief Financial Officer Director  
Other: Alex B. Hutcherson Other: Chief Operating Officer Director

Name of Corporation (As used in Florida):  
Ferguson Enterprises, LLC

(Spelled exactly as it is registered with the state or federal government)

Corporate Address: 751 Lakefront Commons, Newport News, VA 23606

Post Office Box: \_\_\_\_\_

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

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

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

751 Lakefront Commons

Newport News, VA 23606

STATE OF

FLORIDA

CITY OF

LEE

Sworn to (or affirmed) and subscribed before me by means of X physical presence or \_\_\_\_\_ online notarization, this 15 day  
of MARCH 2023, by MARK MCFALLS  
2024

[Signature]  
Notary Public

Personally Known X OR Produced Identification \_\_\_\_\_

Type of Identification Produced N/A



LEE A. POWELL  
Notary Public  
State of Florida  
Comm# HH343489  
Expires 12/21/2026

Date: MARCH 15<sup>TH</sup> 2024

Signed (Person authorized to bind the company): [Signature]

Name (printed): Mark McFalls

Title: General Manager

THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.

### ATTACHMENT 3 – REFERENCES/CLIENT LISTING

Include at least two (2) References and no more than five (5) References within the last 10 years of projects with similar scope as listed in this RFP. The Project Manager and the key design engineer(s) in the proposed project team must show relevant experience in two (2) referenced similar projects.

1. Business/Customer Name City of Cape Coral, FL

Name of Contact Person/Title: Holly Goyette

Telephone# 239-242-3889 Fax \_\_\_\_\_ E-mail hgoyette@capecoral.gov

Address 1015 Cultural Park Blvd, Cape Coral, FL 33990

Phone Number 239-242-3889

Duration of Contract or business relationship 25 years Project completion date: Ongoing

Type of Services Provided Neptune AMI

Cost of Project: Design Construction: \_\_\_\_\_

2. Business/Customer Name: City of Margate, FL

Name of Contact Person/Title: Marta Reczko

Telephone# 615-585-1994 Fax \_\_\_\_\_ E-mail mreczko@margatefl.com

Address 901 NW 66<sup>th</sup> Ave, Suite A, Margate, FL 33063

Phone Number 615-585-1994

Duration of Contract or business relationship 2 Years Project completion date: Ongoing

Type of Services Provided Neptune Cellular AMI

Cost of Project: Design Construction: \_\_\_\_\_

3. Business/Customer Name: Town and Country Utility (Babcock Ranch)

Name of Contact Person/Title: Jon Meyer

Telephone# 941-235-6900 Fax \_\_\_\_\_ E-mail jmeyer@tcufl.com

Address 12150 SR #31, Babcock Ranch, FL 33982

Phone Number 941-235-6900

Duration of Contract or business relationship 5 years Project completion date: Ongoing

Type of Services Provided Neptune AMI

Cost of Project: Design Construction: \_\_\_\_\_

4. Business/Customer Name: Town of Lake Placid, FL

Name of Contact Person/Title: Kevin McCarthy

Telephone# 863-699-3747 Fax \_\_\_\_\_ E-mail lputilities@mylakeplacid.org

Address 1069 US 27 N, Lake Placid, FL 33852  
Phone Number 863-699-3747  
Duration of Contract or business relationship 2 Years Project completion date: Ongoing  
Type of Services Provided Neptune AMI and Cellular AMI  
Cost of Project: Design Construction: \_\_\_\_\_

5. Business/Customer Name: Manatee County

Name of Contact Person/Title: Matt Vanlandingham

Telephone# 941-290-8922 Fax \_\_\_\_\_ E-mail matt.vanlandingham@mymanatee.org

Address 4250 66<sup>th</sup> Street West, Bradenton, FL 34210

Phone Number 941-290-8922

Duration of Contract or business relationship 25 Years Project completion date: Ongoing

Type of Services Provided Neptune AMR and Cellular AMI

Cost of Project: Design Construction: \_\_\_\_\_

Date: MARCH 15<sup>TH</sup> 2024

Signed (Person authorized to bind the company): 

Name (printed): Mark McFalls Title: General Manager

**THIS FORM MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.**

#### ATTACHMENT 4 – DRUG FREE WORKPLACE FORM

The undersigned Consultant in accordance with Florida Statute 287.087 hereby certifies that  
Ferguson Enterprises, LLC dba Ferguson Waterworks does:  
(Company Name)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under bid a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug free workplace through implementation of this section.

Check one:

☒

As the person authorized to sign this statement, I certify that this firm complies fully with above requirements.

☐

As the person authorized to sign this statement, this firm **does not** comply fully with the above requirements.



Offeror's Signature

MARCH 15<sup>TH</sup> 2024

Date

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**



## ATTACHMENT 5 – PUBLIC ENTITY CRIME INFORMATION

As provided by F.S. §287.133, a person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of a public building or public work, may not submit bids 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, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.

I, Mark McFalls, being an authorized representative of the Respondent, Ferguson Enterprises, LLC dba Ferguson Waterworks, located at 18305 Paulson Dr  
City: Port Charlotte State: FL Zip Code: 33954, have read and understand the contents above. I further certify that Respondent is not disqualified from replying to this solicitation because of F.S. §287.133.

Signature: [Signature] Date: 3/15/24

Telephone #: (239) 850 - 7486 Fax #: (941) 627-3519

Federal ID #: 54-1211771

STATE OF FLORIDA  
CITY OF LEE

Sworn to (or affirmed) and subscribed before me by means of X physical presence or      online notarization, this 15  
day of MARCH 2022, by MARK MCFALLS.  
2024

[Signature]  
Notary Public – State of FLORIDA

Personally Known X OR Produced Identification       
Type of Identification Produced N/A



**LEE A. POWELL**  
Notary Public  
State of Florida  
Comm# HH343489  
Expires 12/21/2026

Date: MARCH 15TH, 2024

Signed (Person authorized to bind the company): [Signature]

Name (printed): Mark McFalls Title: General Manager

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.**

ATTACHMENT 6 – NON-COLLUSIVE AFFIDAVIT

State of FLORIDA

City of FORT MYERS

Before me, the undersigned authority, personally appeared:

Mark McFalls

who, being first duly sworn, deposes and says that:

1. He/She is the Representative (Owner, Partner, Officer, Representative or Agent) of Ferguson Enterprises, LLC dba Ferguson Waterworks, the Respondent that has submitted the attached reply;
2. He/She is fully informed respecting the preparation and contents of the attached reply and of all pertinent circumstances respecting such reply;
3. Such reply is genuine and is not a collusive or sham reply;
4. Neither the said Respondent nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant, have in any way colluded, conspired, connived or agreed, directly or indirectly, with any other respondent, firm, or person to submit a collusive or sham reply in connection with the work for which the attached reply has been submitted; or have in any manner, directly or indirectly sought by agreement or collusion, or communication or conference with any respondent, firm, or person to fix the price or prices in the attached reply or of any other respondent, or to fix any overhead, profit, or cost elements of the reply price or the reply price of any other respondent, or to secure through any collusion, conspiracy, connivance, or unlawful agreement any advantage against (Recipient), or any person interested in the reply work.

Signed, sealed and delivered this 15TH day of MARCH, 2024.

By: [Signature]

Mark McFalls

(Printed Name)

General Manager

(Title)

STATE OF FLORIDA

CITY OF FORT MYERS

Sworn to (or affirmed) and subscribed before me by means of X physical presence or      online notarization, this 15 day of MARCH 2023, by MARK MCFALLS.

2024

[Signature]  
Notary Public – State of Florida

Personally Known X OR Produced Identification       
Type of Identification Produced N/A



**LEE A. POWELL**  
Notary Public  
State of Florida  
Comm# HH343489  
Expires 12/21/2026

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## ATTACHMENT 7 – LOBBYING CERTIFICATION

"The undersigned hereby certifies, to the best of his or her knowledge and belief, that":

STATE OF FLORIDA

CITY OF FORT MYERS

This 15 day MARCH of 2023—2024

Mark McFalls

\_\_\_\_\_, being first duly sworn, deposes and says that he or she is the authorized representative of Ferguson Enterprises, LLC dba Ferguson Waterworks (Name of the contractor, firm or individual), and that the vendor and any of its agents agree to have no contact or communication with, or discuss any matter related in any way to any active City of North Port solicitation, with any City of North Port elected officials, officers, their appointees or their agents or any other staff or outside individuals working with the city in respect to this request other than the designated Procurement Official Contact and to abide by the restrictions outlined in the General Terms and Conditions of the Solicitation. Technical questions directed to the project manager, are prohibited. These persons shall not be lobbied, either individually or collectively, regarding any questions for bid, proposal, qualification and/or any other solicitations released by the city. To do so is grounds for immediate disqualification from the selection process. The selection process is not considered final until such a time as the Commission has made a final and conclusive determination.

(a) No City appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence either directly or indirectly an officer or employee of the City, City Commission in connection with the awarding of any City Contract.

(b) If any funds other than City appropriated funds have been paid or will be paid to any person for influencing or attempting to influence a member of City Commission or an officer or employee of the City in connection with this contract, the undersigned shall complete and submit Standard Form-L "Disclosure Form to Report Lobbying", in accordance with its instructions.

Signed, sealed and delivered this 15 day of MARCH, 2023. 2024

By: [Signature]

Mark McFalls

(Printed Name)  
General Manager

(Title)

STATE OF FLORIDA

CITY OF FORT MYERS

Sworn to (or affirmed) and subscribed before me by means of X physical presence or \_\_\_ online notarization, this 15 day of MARCH 2023; by MARK MCFALLS.  
2024

Notary Public – State of FLORIDA

Personally Known X OR Produced Identification \_\_\_\_\_  
Type of Identification Produced N/A



LEE A. POWELL  
Notary Public  
State of Florida  
Comm# HH343489  
Expires 12/21/2026

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**

## ATTACHMENT 8 – CONFLICT OF INTEREST FORM



F.S. §112.313 places limitations on public officers (including advisory board members) and employees' ability to contract with the City either directly or indirectly. Therefore, please indicate if the following applies:

**PART I.**

☐ I am an employee, public officer or advisory board member of the City  
\_\_\_\_\_ (List Position Or Board)

☐ I am the spouse or child of an employee, public officer or advisory board member of the City  
Name: \_\_\_\_\_

☐ I am an employee, public officer or advisory board member of the City, or their spouse or child, is an officer, partner, director, or proprietor of Respondent or has a material interest in Respondent. "Material interest" means direct or indirect ownership of more than 5 percent of the total assets or capital stock of any business entity. For the purposes of [§112.313], indirect ownership does not include ownership by a spouse or minor child.  
Name: \_\_\_\_\_

☐ Respondent employs or contracts with an employee, public officer or advisory board member of the City  
Name: \_\_\_\_\_

☒ None Of The Above

**PART II:**

Are you going to request an advisory board member waiver?

☐ I will request an advisory board member waiver under §112.313(12)

☐ I will NOT request an advisory board member waiver under §112.313(12)

☒ N/A

The City shall review any relationships which may be prohibited under the Florida Ethics Code and will disqualify any vendors whose conflicts are not waived or exempt.

BUSINESS NAME: Ferguson Enterprises, LLC dba Ferguson Waterworks

NAME (PERSON AUTHORIZED TO BIND THE COMPANY): Mark McFalls, General Manager

SIGNATURE:  DATE: MARCH 15<sup>TH</sup>, 2024

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**

## ATTACHMENT 9 – DISCLOSURE FORM FOR CONSULTANT/ENGINEER/ARCHITECT

Please select (only) one of the following three options:

☒ Our firm has no actual, potential, or reasonably perceived, **financial\*** or **other interest\*\*** in the outcome of the project.

☐ Our firm has a potential or reasonably perceived **financial\*** or **other interest\*\*** in the outcome of the project as described here: \_\_\_\_\_.

☐ Our firm proposes to mitigate the potential or perceived conflict according to the following plan:  
\_\_\_\_\_.

☐ Our firm has an actual **financial\*** or **other interest\*\*** in the outcome of the project as described here:  
\_\_\_\_\_.

**\*What does "financial interest" mean?**

If your firm, or employee of your firm working on the project (or a member of the employee's household), will/may be perceived to receive or lose private income depending on the government business choices based on your firm's findings and recommendations, this must be listed as a financial interest. An example would be ownership in physical assets affected by the government business choices related to this project. The possibility of contracting for further consulting services is not included in this definition and is not prohibited.

**\*\*What does "other interest" mean?**

If your firm, or employee of your firm working on the project (or a member of the employee's household), will/may be perceived to have political, legal or any other interests that will affect what goes into your firm's findings and recommendations, or will be/may be perceived to be affected by the government business choices related to this project, this must be listed as another interest.

BUSINESS NAME: Ferguson Enterprises, LLC dba Ferguson Waterworks

NAME (PERSON AUTHORIZED TO BIND THE COMPANY): Mark McFalls, General Manager

SIGNATURE:  DATE: MARCH 15<sup>TH</sup>, 2024

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**

## ATTACHMENT 10 – SCRUTINIZED COMPANY CERTIFICATION FORM

Company Name: <u>Ferguson Enterprises, LLC dba Ferguson Waterworks</u>			
Authorized Representative Name and Title: <u>Mark McFalls, General Manager</u>			
Address: <u>18305 Paulson Dr.</u>	City: <u>Port Charlotte</u>	State: <u>FL</u>	ZIP: <u>33954</u>
Phone Number: <u>(239) 850 - 7486</u>		Email <u>mark.mcfalls@ferguson.com</u>	
Address: <u>18305 Paulson Dr, Port Charlotte, FL 33954</u>			

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with the City of North Port for goods or services of any amount if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Florida Statutes, section 215.4725, or is engaged in a boycott of Israel.

A company is ineligible to, and may not, bid on, submit a proposal for, or enter into or renew a contract with the City of North Port for goods or services of \$1 million or more if, at the time of bidding on, submitting a proposal for, or entering into or renewing such contract, the company is on the Scrutinized Companies with Activities in Sudan List, the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, created pursuant to Florida Statutes, section 215.473, or with companies engaged in business operations in Cuba or Syria.

### CHOOSE ONE OF THE FOLLOWING

☒ This bid, proposal, contract, or contract renewal is for goods or services of less than \$1 million. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes, section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel.

☐ This bid, proposal, contract, or contract renewal is for goods or services of \$1 million or more. As the person authorized to sign on behalf of the above-named company, and as required by Florida Statutes, section 287.135(5), I hereby certify that the above-named company is not participating in a boycott of Israel, is not on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and it does not have business operations in Cuba or Syria.

I understand that pursuant to Florida Statutes, section 287.135, the submission of a false certification may result in the termination of the contract if one is entered into, and may subject the above-named company to civil penalties, attorney's fees and costs.

Certified By:   
AUTHORIZED REPRESENTATIVE SIGNATURE

Print Name and Title: Mark McFalls, General Manager

Date Certified: MARCH 15<sup>TH</sup>, 2024

Solicitation/Contract/PO Number (Completed by Purchasing): \_\_\_\_\_

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL.**



ATTACHMENT 11 – VENDOR’S CERTIFICATION FOR E-VERIFY SYSTEM

STATE OF FLORIDA  
CITY OF FERT MYERS

The undersigned Vendor/Consultant/Contractor (Vendor), after being duly sworn, states the following:

1. Vendor is a person or entity that has entered into or is attempting to enter into a contract with the City of North Port (City) to provide labor, supplies, or services to the City in exchange for salary, wages or other remuneration.
2. Vendor has registered with and will use the E-Verify System of the United States Department of Homeland Security to verify the employment eligibility of:
  - a. All persons newly hired by the Vendor to perform employment duties within Florida during the term of the contract; and
  - b. All persons, including sub-contractors, sub-vendors, or sub-consultants, assigned by the Vendor to perform work pursuant to the contract with the City.
3. If the Vendor becomes the successful Contractor who enters a contract with the City, then the Vendor will comply with the requirements of Section 448.095, Fla. Stat. "Employment Eligibility", as amended from time to time.
4. Vendor will obtain an affidavit from all subcontractors attesting that the subcontractor does not employ, contract with, or subcontract with, an unauthorized alien as defined in 8 United States Code, Section 1324A(H)(3).
5. Vendor will maintain the original affidavit of all subcontractors for the duration of the contract.
6. Vendor affirms that failure to comply with the state law requirements can result in the City's termination of the contract and other penalties as provided by law.

VENDOR: Ferguson Enterprises, LLC  
dba Ferguson Waterworks (Vendor's Company Name)

[Signature] (Vendor signature)

Mark McFalls (Vendor's name printed)

General Manager (Title)

Sworn to and subscribed before me by means of X physical presence or \_\_\_online notarization, this 15 day  
of MARCH, 2023, by MARK MCFALLS as GENERAL MANAGER.  
2024

[Signature]  
Notary Public

Personally Known X OR Produced Identification \_\_\_\_\_

Type of Identification Produced N/A



**LEE A. POWELL**  
Notary Public  
State of Florida  
Comm# HH343489  
Expires 12/21/2026

**THIS PAGE MUST BE COMPLETED AND SUBMITTED WITH PROPOSAL**

**END OF PART IV**

## SECRETARIAL CERTIFICATE OF AUTHORIZATION

The undersigned Assistant Secretary of **Ferguson Enterprises, LLC**, duly organized and existing under the laws of Virginia (the "Company"), hereby designates and certifies that the following employee of the Company, is authorized, on behalf of the Company to take the action(s) designated herein and to execute any and all documents necessary to further such actions:

**Individual Name:** Mark McFalls

**Title:** General Manager III

DB  
KG

**Authorized Action(s):**

- 1 To enter into contracts, agreements or other documents, and to execute such documents and undertake all such acts as may deemed in the best interest of the Company
2. To prepare and submit bids and proposals to the Company's customers.

This certificate of authorization shall be effective from the date hereof until **November 9, 2024** unless withdrawn sooner in writing. The provisions of this Certificate are in conformity with a Resolution adopted by the Board of Directors of the Company effective July 31, 2023

In witness whereof, I have hereunto subscribed my name and affixed the seal of the Company, effective **November 10, 2023**.



(Company Seal)

**Ferguson Enterprises, LLC**

A handwritten signature in black ink, appearing to read "Wesley E. Rice".

Wesley E. Rice  
Assistant Secretary

Commonwealth of Virginia  
City of Newport News

Sworn to subscribe and acknowledged before me on November 10, 2023, by Wesley E. Rice, personally known to me, in his capacity as Assistant Secretary of Ferguson Enterprises, LLC, a Virginia LLC, on behalf of such Company



(Notary Seal)

A handwritten signature in black ink, appearing to read "Casey Mehlhoff".

Notary - Casey Mehlhoff  
My commission expires: July 31, 2026





# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

5/1/2024

10/2/2023

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> Lockton Companies 3280 Peachtree Road NE, Suite #1000 Atlanta GA 30305 (404) 460-3600	<b>CONTACT NAME:</b> <b>PHONE (A/C. No. Ext):</b> <b>E-MAIL ADDRESS:</b>	<b>FAX (A/C. No):</b>
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURER A:</b> ACE American Insurance Company		22667
<b>INSURER B:</b> ACE Property and Casualty Insurance Company		20699
<b>INSURER C:</b> Indemnity Insurance Co of North America		43575
<b>INSURER D:</b> ACE Fire Underwriters Insurance Company		20702
<b>INSURER E:</b>		
<b>INSURER F:</b>		

**COVERAGES****CERTIFICATE NUMBER:** 19933508**REVISION NUMBER:** XXXXXXXX

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	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC <input type="checkbox"/> OTHER:	N	N	HDO G47312097	5/1/2023	5/1/2024	EACH OCCURRENCE \$ 5,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 5,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 5,000,000 GENERAL AGGREGATE \$ 10,000,000 PRODUCTS - COMP/OP AGG \$ 10,000,000 \$
A	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY <input checked="" type="checkbox"/> Self Insured <input checked="" type="checkbox"/> Physical Damage	N	N	ISA H10707377	5/1/2023	5/1/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 5,000,000 BODILY INJURY (Per person) \$ XXXXXXXX BODILY INJURY (Per accident) \$ XXXXXXXX PROPERTY DAMAGE (Per accident) \$ XXXXXXXX \$ XXXXXXXX
B	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$	N	N	XOOG72519802 003	5/1/2023	5/1/2024	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$ XXXXXXXX
C A D	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input checked="" type="checkbox"/> N	N/A	WLR C70312165(AOS) WLR C70312128(AZ,CA,MA,OR) RWC C70312244(WI)	5/1/2023 5/1/2023 5/1/2023	5/1/2024 5/1/2024 5/1/2024	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ 2,000,000 E.L. DISEASE - EA EMPLOYEE \$ 2,000,000 E.L. DISEASE - POLICY LIMIT \$ 2,000,000

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES** (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Workers Compensation Policy WLR C70312165 provides coverage for AK, AL, AR, CO, CT, DC, DE, FL, GA, HI, IA, ID, IL, IN, KS, KY, LA, MD, ME, MI, MN, MO, MS, MT, NC, NE, NH, NJ, NM, NV, NY, OK, PA, RI, SC, SD, TN, TX, UT, VA, VT, WV

**CERTIFICATE HOLDER****CANCELLATION** See Attachment19933508  
Evidence Only

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

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# *State of Florida*

## *Department of State*

I certify from the records of this office that FERGUSON ENTERPRISES, LLC is a Virginia limited liability company authorized to transact business in the State of Florida, qualified on April 9, 2019.

The document number of this limited liability company is M19000003601.

I further certify that said limited liability company has paid all fees due this office through December 31, 2023, that its most recent annual report was filed on August 1, 2023, and that its status is active.

I further certify that said limited liability company has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-first day of February,  
2024*



  
*Secretary of State*

Tracking Number: 7804539855CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>