



St. Moritz
SECURITY SERVICES, INC.

DELIVERING CONFIDENCE IN PRIVATE SECURITY SERVICES

#005-21 CITY OF KEY WEST PRIVATE SECURITY SERVICES

May 26, 2021 3:00 PM EST

PRESENTED TO

City of Key West and City of Key West Caroline Street and
Bahama Village Community Redevelopment Agency (CITY)
Office of the City Clerk
1300 White Street
Key West, Florida, 33040

PRESENTED BY

ST. MORITZ SECURITY SERVICES
Pat Hurley, Regional Director of Business Development
Phone: (239) 537-1711
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AMERICAN OWNED & OPERATED



SINCE 1982

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May 26, 2021

St. Moritz
SECURITY SERVICES, INC.

City of Key West and City of Key West Caroline Street and
Bahama Village Community Redevelopment Agency (CITY)
Office of the City Clerk
1300 White Street
Key West, Florida, 33040

MIRAMAR | FLORIDA
3350 SW 148th Avenue, Suite 110
Miramar, FL 33027
Phone: (954) 306-9704
www.smssi.com

RE: RFP #005-21 for Private Security Services

Dear Evaluation Team for the City of Key West,

It is our privilege to provide this proposal for security services to selected City of Key West owned and leased properties including but not limited to Key West Bight, Key West Bight Ferry Terminal, and City Marina. We have reviewed the scope of service, and we are prepared to meet your needs and by delivering a high level of security service.

Our expertise in city, state, and government security began with our executive leadership team, which have all lent their expertise in sculpting security programs to entities similar to the City of Key West. This expertise allows St. Moritz the unique distinction of providing you experienced management, reliable protection, and service that makes the most of your operating budget. As your security partner, it is our goal to meet and exceed your expectations with our dedicated personnel, innovative technology, and commitment to client satisfaction.

- The operational stability and financial strength of a \$110M+ company that has been in business since 1982
- A strong belief in employee investment as evidenced by our programs, training capabilities and advancement opportunities, all of which have contributed to our excellent retention rates
- Direct access to our executive team to assist you with any challenges
- Use of our exclusive technology applications such as TrackTik, which supports electronic reporting, personnel management, and critical incident management
- Compliance management to better ensure our business transactions are accurate and timely
- Our 24/7 Security Operations Center (SOC) to assist with site communication, sourcing additional coverage, and virtual post inspections as needed, among other critical functions

We look forward to delivering a first-class security program. Should you require additional information or have further questions, please contact me at phurley@smssi.com or (239) 537-1711.

Respectfully,

Pat Hurley

Pat Hurley
Regional Director of Business Development

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EXECUTIVE SUMMARY

ABOUT ST. MORITZ SECURITY SERVICES

St. Moritz Security Services, Inc. (SMSSI) is the one of the largest Pittsburgh-based security provider and is among the few remaining home-grown operations led by its originator. St. Moritz was incorporated in 1982 by Philip St. Moritz and he remains the company's current principal.

The company has been in continuous operation for 39 years. St. Moritz is a Pennsylvania "S" Corporation and managed by Matthew Schwartz, Chief Executive Officer.

St. Moritz has specialty business units which offer commercial security, ATM escort, and retail/ loss prevention, and janitorial (St. Moritz Building Services, Inc). The company has core operations and is licensed in 25 US States with affiliate service capabilities in all 50 states.

SERVICING OFFICE

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MAIN PROPOSAL CONTACT

Pat Hurley, Regional Director of
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KEY ELEMENTS OF THE PROPOSAL

The City of Key West is an Island city part of the Florida Keys archipelago. It is famous for water sports, lively nightlife, robust tourism, and is a cruise-ship stop destination. More importantly, it is home to the local people that live and work within the community. The City cares a great deal for its residents and is always planning for and improving public resources, charitable support, and hurricane and weather-related recovery efforts. A part of the City's property and facilities include Key West Bight, Key West Bight Ferry Terminal, and City Marina. These areas benefit from a dynamic security plan which includes a professional security workforce. To support the City's success, St. Moritz security will be an active security partner offering performance-based services along with reliable and consistent protection in a fiscally responsible manner.

The key elements of this proposal will demonstrate our understanding of the City's needs and the availability and capability of our Company to perform the scope services as outlined in the RFP. This includes the experience and qualifications of St. Moritz as well as the key personnel who will be assigned to manage this security project. We will address the permanent representation of our supervisory capacity, geographical location of the local branch office, and technology offerings. Finally, we will submit an inventory of references to support our prior and current work in similar capacities for government or city entities.



COMPANY OFFICIALS

CORPORATE OFFICERS | BOARD OF DIRECTORS

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CORPORATE TEAM

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EXPERIENCE AND QUALIFICATIONS

THE SERVICING OFFICE FOR THE CITY OF KEY WEST

St. Moritz Security Services, Inc. | Maramar Branch
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Phone: (239) 789-4831
Email: jsubic@smssi.com
Website: www.smssi.com

Miramar Organization Chart

The below organization chart displays key resources within the branch. Resources will be assigned to the City of Key West upon award.



Since inception in **1982**, St. Moritz Security (a Pennsylvania **"S" Corporation**) has maintained an uncompromisable commitment to providing exemplary customer service. For nearly **40 years** the Company has actively promoted industry-leading Health, Safety, Security, and Protection Solutions. Many of our initial clients are still with us today. This is a direct result of our attention to detail combined with the collective institutional knowledge and professionalism of our operational and executive management employees.

OFFICES & LICENSING

To serve our Florida portfolio, St. Moritz maintains fully-staffed offices in Ft. Lauderdale, Ft. Myers, Orlando, West Palm Beach, Tampa, and a satellite office in Pensacola. The Company is registered as a legal entity and certified by the State of Florida to conduct business document **#F03000001208** (qualified on March 11, 2003).

The Company holds a business license issued by the Florida Department of Agriculture and Consumer Services License **#BB1900021**. St. Moritz senior management teams possess either a Class "M" or a Class "MB" security managers license, also issued by the State.

RELATIVE SIZE OF THE FIRM

St. Moritz employs approximately 4,000 personnel nationwide with 500+ in Florida alone. The Company has an established national footprint, placing St. Moritz among the largest and most successful American-owned and operated security officer providers in the USA, and nearly 40-years of experience exceeding our clients' and employee's high expectations.

St. Moritz operates in 30+ states in addition to affiliate partners providing supplemental services in all 50 states throughout North America. With annual sales in excess of \$110 million dollars, St. Moritz Security is ranked as one of the largest American-Owned security services companies and within the top two (2%) of companies worldwide.

The company employs approximately 3,000 professional trained and licensed security officers (armed and unarmed). They are managed by a team of field supervisors, operations managers, and branch managers, who report to regional managers and vice presidents. To support management efforts we provide a series of management resources which include a corporate human resources department, technology department, training department, and quality compliance department.



EXPERIENCE - LIST OF RELATED PROJECTS

St. Moritz has a proven track record of providing superior security services to city, state, federal, and government entities including buildings, and colleges, and critical infrastructure sites. We provide security programs to meet contracts demanding 24/7 on-demand security, access control, electronic reporting, foot and vehicle patrol, policy and regulation enforcement, physical searches, CCTV monitoring and more.

As you review our list of current contracts, please notice we have underpinned the activities at each location which most similarly relate the security scope provided for the City of Key West. We have also provided a full work description of each project.

It is important to note the longevity of some these projects, **Penn State University** has been an on-going client since 1998 (**twenty-six years**), the **Workers' Compensation Office of Adjudication** since 2009 (**twelve years**), and the **Pennsylvania Department of Military and Veterans Affairs** since 1996 (**twenty-five years**). These client retention timelines illustrate St. Moritz as a valued partner to these organizations, not only supporting their goals for safety and risk mitigation, but also adhering to and remaining flexible with evolving budgetary constraints.

Department of Labor & Industry Workers' Compensation Office of Adjudication Vertical: Government Entity	
<p>WORK DESCRIPTION</p> <p>Ensuring the physical safety of anyone who visits the courthouse is a chief concern for court security. St. Moritz officers post outside of the judges' chambers and monitor all individuals entering the courtroom. Officers use handheld wands to screen visitors, and conduct bag searches to ensure prohibited items are not brought into the facility. Officers also manage the Covid-19 screening for all parties.</p> <p>Covid-19 Screening:</p> <p>In addition to the regular responsibilities security must also:</p> <ul style="list-style-type: none"> • Screen each party according to the script • Ensure each party is wearing a mask. Direct the parties to their scheduled hearing room at the appropriate time. • Ensure social distancing, wipe down any used surfaces in between hearings 	<p>SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS:</p> <ul style="list-style-type: none"> • Maintain a Daily Activity Log • Monitor for/and report safety hazards • Visual deterrent to unwanted activity • Foot patrol • Enforce policies • Regular interaction with public • Record Incidents / Prepare Security Activity Reports
Degree of Public Contact	100% of security time is dedicated to assisting the public and courthouse employees.
Location / # HPW	Harrisburg, PA – hours per week vary depending on courthouse schedule
Start of Service	February 2, 2009 – Current



Pittsburgh Water & Sewer Authority (PWSA) Vertical: Government-owned & Controlled Corporation or GOCC	
WORK DESCRIPTION Provide protection workforce and manage the security operations for the Pittsburgh Water and Sewer Authority. Intense focus on safety and anti-terrorism. Officers are responsible for entrance/egress control of vehicles and pedestrian traffic, maintain access control, visitor registration system and outlined procedure which includes ID check of all personnel. Officers monitor the river alongside the site to detect and deter terrorism-related and unwanted activity. Officers safeguard materials, data, equipment, and property to deter loss, theft, or damage. Security is responsible for emergency plans, responding and participation with the plans, and procedures. Officers prepare reports and document unusual situations or circumstances as well as conduct foot and vehicle patrols of the site and complete electronic Daily Activity Logs via TrackTik to record activity. The secondary location for PWSA is a reservoir, monitor after-hours when PWSA employees are off duty. Regular vehicle patrol of the reservoir and surrounding area is performed. Response to alarms, fires, injuries, security incidents, emergency situations, and investigate suspicious activities.	SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS: <ul style="list-style-type: none"> • Maintain a Daily Activity Log • Monitor for/and report safety hazards • Visual deterrent to unwanted activity • Foot patrol to surveillance property and facilities • Enforce rules and regulations • Identify individuals breaking laws, codes or policies • Regular interaction with public • Record Incidents / Prepare Security Activity Reports • Vehicle patrol
Degree of Public Contact	25% Most of security time is dedicated to monitoring the site, some interaction with visitors and pedestrian traffic.
Location / # HPW	Pittsburgh PA – 300+ hours per week
Start of Service	February 2, 2019 – Current

Pennsylvania Liquor Control Board Stores and PLCB Headquarters Vertical: Independent Government Agency	
WORK DESCRIPTION St. Moritz provides armed and unarmed, professional security personnel to the PLCB Fine Wine & Spirits stores. Officers are responsible for observing patrons and employees, greeting customers, performing foot roves, and deterring unwanted activities in, and around the premises. They perform Covid-19 screening and enforce social distancing and mask mandates. SPECIAL TRAINING: Armed License, Act 235. Officers at this location also receive training on the Use-of-Force Policy, verbal de-escalation techniques, and wandng and screening methods.	SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS: <ul style="list-style-type: none"> • Maintain a Daily Activity Log • Monitor for/and report safety hazards • Visual deterrent to unwanted activity • Foot patrol • Enforce rules and regulations • Identify individuals breaking laws, codes or policies • Regular interaction with public • Record Incidents / Prepare Security Activity Reports • Vehicle patrol
Degree of Public Contact	100% of security personnel interaction is with the public.
Location / # HPW	Multiple Locations throughout Pennsylvania – 1,900+ hours per week
Start of Service	January 1, 2007 – Current

Pennsylvania Department of Military and Veterans Affairs | Bureau of Office Services
Vertical: Military Government Agency

WORK DESCRIPTION

At the Pennsylvania Department of Military and Veterans Affairs, St. Moritz officers are armed and ACT 235 certified (armed). Officers provide security to two (2) sites; Fort Indiantown Gap and Johnstown bases, in accordance with Army regulations to provide safety to personnel and assets. Officers are responsible for ID verifications at the gated checkpoints to control access to the site. Additional duties include reporting via TrackTik (Daily Reports and Incident Reports), and logging visitors.

SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS:

- Maintain a Daily Activity Log
- Monitor for/and report safety hazards
- Visual deterrent to unwanted activity
- Regular interaction with personnel and visitors
- Record Incidents / Prepare Security Activity Reports

Degree of Public Contact	50% of security personnel interaction is with civilians/public, 50% is with the employees of the bases
Location / # HPW	Indiantown Gap, Annville, PA – 1,900+ hours per week
Start of Service	February 1996 – Current

Penn State University
Vertical: Public State-related Land-grant Research University

WORK DESCRIPTION

Access control at two Data Centers and one reactor location. Provide extensive coverage for athletic events, parking, and traffic control, armed cash escorts, special events support, security coverage at University Park Airport. The airport coverage also entails 24-hour service, bag checks, employee or passengers escort, CCTV, surveillance monitoring, employee ID verifications, vendor escorts, emergency response, reporting (TrackTik) vehicle, patrol roves, foot roves, lock / unlock checks, safety inspections, evict trespassers, lost and found / bag procedures, fire suppression, incident response, and police liaison.

SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS:

- Maintain a Daily Activity Log
- Monitor for/and report safety hazards
- Visual deterrent to unwanted activity
- Foot patrol to surveillance property and facilities
- Enforce rules and regulations
- Identify individuals breaking laws, codes or policies
- Frequent interaction with public
- Record Incidents / Prepare Security Activity Reports

Degree of Public Contact	100% of security personnel interaction is with students, public, and faculty
Location / # HPW	State College, PA – 452+ hours per week, 180 hours additional for each football game event
Start of Service	1998 – Current



Pittsburgh City County Building
Vertical: Government Facility

WORK DESCRIPTION

St. Moritz provides security to The Pittsburgh City-County Building. This location houses the seat of government for the City of Pittsburgh, as well as both Pittsburgh and Allegheny County offices. It is located in Downtown Pittsburgh.

The focus of the security program is preventing unwanted activities within and around the property, including terrorism. Responsibilities of the officers include patrolling and observing the activities of persons in-and-around the building, grounds, and parking structures. Security monitors Closed Circuit Television (CCTV) for intrusion, fire, and alarms. Officers are responsible for responding to security situations and alarm calls, preventing unauthorized access to restricted areas, answering routine inquiries, daily report documentation, and directing visitors.

SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS:

- Maintain a Daily Activity Log
- Monitor for/and report safety hazards
- Visual deterrent to unwanted activity
- Foot patrol to surveillance building and perimeter
- Enforce rules and regulations
- Identify individuals breaking laws, codes or policies
- Regular interaction with public
- Record Incidents / Prepare Security Activity Reports

Degree of Public Contact	100% of security personnel interaction is with visitors and employees to the building
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Location / # HPW	Pittsburgh PA – 560+ hours per week
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Start of Service	March 2015– Current
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Keys Gate Community Association
Vertical: Large-Scale Community Association

WORK DESCRIPTION

St. Moritz provides officers to Keys Gate Community Association. All security personnel are Florida licensed (Class D) community ambassadors trained to create a positive first impression for residents, and presence is a visual deterrent to unwanted activities. Officers check identification, maintain visitor lists, open/secure gates at designated times and provide resident and visitor assistance. Officers enforce community rules and regulations to keep residents safe. They monitor traffic and parking controls, identify suspicious behavior, and enforce noise ordinances. They assist during emergencies to help law enforcement by ensuring that police, fire or medical personnel find the scene efficiently, so no time is wasted. Security aids in maintaining the integrity of the scene by keeping vehicles, and other residents at a distance, allowing emergency responders to do their work.

SIMILAR TO THE CITY OF KEY WEST SCOPE TASKS:

- Maintain a Daily Activity Log
- Monitor for/and report safety hazards
- Visual deterrent to unwanted activity
- Foot patrol to surveillance property
- Enforce rules and regulations
- Identify individuals breaking laws, codes or policies
- Enforce parking regulations
- Regular interaction with public
- Record Incidents / Prepare Security Activity Reports

Degree of Public Contact	100% of security time is dedicated to assisting the public and residents.
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Location / # HPW	Homestead, Florida – 1,541 hours per week
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Start of Service	January 1, 2020 – Current
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APPROACH TO SCOPE OF WORK

St. Moritz officers will protect the personnel and property of the The City of Key West while also creating sense of security and safety for visitors, tourists, staff, and the public. They will report hazardous or unsafe conditions on the premise and respond to suspicious activity.

Following the award of the contract, St. Moritz Security will begin the process of transition. This includes interviewing incumbent staff and extending job offers to personnel that meets our criteria. Once staffing levels are established, officers will be hired utilizing predefined vetting criteria, specific to The City of Key West's requirements. All new and incumbent personnel will be trained and compliance will be verified and tracked.

St. Moritz will organize a training program for officers to be assigned to the City. Officers will be trained on the customized and updated post orders. Upon completion of training and service implementation, St. Moritz will manage the program utilizing our current technology and management tools. This technology includes the operation software (TrackTik), Finally, we will perform an on-going quality control plan with verified successful methods of evaluation, and assessments. **The service deliverables will be supported by the following plan:**



SCOPE OF WORK DELIVERY PLAN



NARRATIVE OF CITY'S SECURITY OBJECTIVES

SERVICES: The City of Key West seeks to obtain the services of a private security to provide unarmed security service for selected City of Key West owned and leased properties including but not limited to Key West Blight, Key West Blight Ferry Terminal, and City Marina.

FINANCIAL CAPABILITY & RESOURCES: We understand it is important to the City of Key West to contract with a reputable firm with an established and financially stable foundation coupled with a positive future projection. St. Moritz offers the operational stability and financial strength of a \$110M+ company (2020) that has been in business for more than 39 years. St. Moritz realized a little over 11.1 % increase in annual sales volume from 2019 to 2020. We are able to offer top-tier wages, benefits, training, and recruiting campaigns to fully support the success of this project.



APPROACH/NARRATIVE CONTINUED

LICENSING & LOCATION: St. Moritz will furnish documentation showing compliance with the licensing requirements of County, and City licenses as required within ten days of the award. St. Moritz Security will also satisfy the City Attorney as to such insurance coverage and legal requirements. **St. Moritz confirms we will assign permanent supervisory personnel with decision-making autonomy who will reside and work from an established substation in the City of Key West or within 35 miles of Key West no later than 30-days of bid award.**

OFFICER REQUIREMENTS: Security officers assigned to the City will have a valid State of Florida Class D Security License, valid Transportation Workers Identification Card (TWIC) or be able to obtain one, and be screened accordingly for literacy, US Citizenship, HS diploma or equivalent and will complete a training program to include technique and patrol, first aid including CPR, public relations, safety, proper use of telephones and radio, and proper use of written report forms. All personnel assigned to the City will have a supervisor train them at their post/assignment (on-the-job training).

EQUIPMENT AND COVERAGE: St. Moritz will provide officers a uniform, communications equipment, flashlight, a name tag, vehicle or golf cart (if required), supervision, and twenty-four (24) hour per day, seven days per week communications access for the City and the officers. Officers will have a smartphone to contact the office, supervisor of the facilities, or designees.

Officers assigned to the ferry will understand the flexibility requirements of their post and will be required to provide additional coverage if required. St. Moritz will further support the City by providing additional security needs within a minimum of twelve (12) hours of notification by the City. Officers will remain on-duty until properly relieved by a flex-force officer, supervisor, or field supervisor.

MANAGEMENT INVOLVEMENT: The local branch management team will conduct quarterly meetings in Key West with the City representatives. The supervisor and field supervisors will inspect all of the facilities at least once each month to ensure adherence to prescribed procedures and to familiarize with any possible safety or security problems. Visits will be recorded in a log.

COMPLIANCE: The City of Key West requires St. Moritz officers to be neat and clean in appearance as well as courteous to residents, visitors at the facilities, and City personnel. Officers will interact with the business tenants, marina tenants, and the general public at each facility regularly during each shift. A complete list of prohibited items and conduct will be outlined in the job description provided to the officer during training, to include (but not limited to): ban of carrying or utilizing weapons, mace/pepper spray, or nightsticks, and activities or conversations which detract from a) the officer's professional image and security code of conduct, or b) distract the officer from observing and monitoring activities and performing tasks congruent to the scope of service.



★★★★★
EXPERTS in
Security Service Delivery



APPROACH CONTINUED

TRANSITION PLAN

PLANNING AN EFFECTIVE START-UP

St. Moritz will utilize a phased transition approach with a transition team to smoothly and assuredly start security service for the City of Key West. We begin with our traditional plan and then tailor it to meet your requirements and timetable.

We know that changing providers can be a source of anxiety. To alleviate concerns, we communicate throughout each step of the process to everyone affected. Our goal is to make the transition a good experience for you by using proven systems with the following steps:

- **ASSEMBLE** a transition team and local resources
- **IDENTIFY** services needs
- **SELECT** the appropriate personnel
- **IMPLEMENT** plan development and timetable for a seamless transition

INTRODUCING YOUR TRANSITION TEAM EXPERTS

Our team will create a smooth start-up and a well-managed transition, free from time-consuming disruptions. In addition, we will plan for providing a flex pool of cross trained personnel, emergency labor, equipment, and services from a local office should the need arise.

Our dedicated and experienced transition team will work with your project manager, review the service transition schedule, and determine responsibilities. Start and completion dates of each milestone, deliverables and all resources will be established and communicated. The following team will lead the process:

- Matthew Schwartz, Chief Executive Officer
- Lenny Neff, Senior Vice President
- Joe Subic, Branch Manager
- Pat Hurley, Regional Director of Business Development
- Corporate Human Resources
- Local Administrative Support

Providing a SEAMLESS &
DISTRACTION-FREE Transition



APPROACH CONTINUED

OPEN & ONGOING COMMUNICATION

The key to a successful transition is ongoing and clear communication of expectations, objectives and outcomes. The best practice for a thorough plan implementation involves management at all levels — on both sides.

Starting in the very earliest stages of Implementation, St. Moritz sets regular meetings to discuss each phase of the transition. We have discovered that it is useful to survey all who will be affected by this change prior to the start of our service. This allows us to address questions and concerns and gather information before moving forward. We will meet with you on an ongoing basis to identify best practices and implement them, as needed.

SUPPORT & COORDINATION

The start-up team will work with your project manager, to review the service transition schedule and determine responsibilities, completion dates, deliverables, and all resources required. They assist the on-site project management team, which includes specialists from the appropriate areas of expertise throughout our organization. The team will remain dedicated until your planned level of service is achieved and your objectives are being met.

ESTIMATED TIME FRAME

Our service start-up plan customarily takes place during a four-to-six-week period and typically starts within thirty days of an award. Depending on the number of locations, breadth of service and your requirements, the time-frame may be longer or shorter.

POST TRANSITION—TOGETHER TOWARDS TOMORROW

To ensure a successful security program for the City of Key West, the St. Moritz team will continue to meet with you and provide updates on service delivery. For a period following the start of service, a member of our management team will visit the site daily to inspect officer posts, uniforms, and reports. It will be during this time that the first operational analysis will occur. This feedback will be used to fine-tune service issues, reports, or technology.

CROSS TRAINING & BACK-UP PERSONNEL

During the first weeks following the start of service, St. Moritz will selectively cross-train additional officers on various posts. These officers will be a part of the flex team for the City of Key West. They will cover for emergencies and unexpected events such as call-offs.

OFF-HOURS INSPECTIONS

Managers and field supervisors will conduct off-hours inspections. These visits will be an opportunity to observe officers conduct their roves, tours, and various other responsibilities. Corrections and coaching in the early weeks of service steer the security staff towards enduring success.



APPROACH CONTINUED

TRANSITION PLAN OF ACTION + MILESTONES

The following start-up plan establishes how St. Moritz will become an integrated part of your workflow. As we move forward, we will provide additional details to further customize this plan. Once the plan is finalized, we will complete your transition timetable. This identifies each task, who owns it, and its expected completion date.

TRANSITION SCHEDULE FOR THE CITY OF KEY WEST						
WEEKS				START	ACCOUNTABILITY	TRANSITION ACTIVITY
4	3	2	1			
X	X	X	X		VP, RM	Conduct weekly client meetings
X					VP, RM	Confirm contract award and introduce transition team
X					VP, RM, BM	Confirm transition start date/time and incumbent notice of cancellation
	X				CM	Provide certificate of insurance.
X					VP, RM, BM, OM	Provide letter to incumbent personnel (if retention is desired)
	X				RM, BM, OM, HR	Host Incumbent meet & greet (if applicable) & assess personnel requirements
X	X				VP, RM, BM	Meet to finalize transition plan and review contract specifics
	X				VP, RM, BM	Re-confirm: master schedule, employee pay, billing & benefit plans
	X	X			RM, BM, OM	Acquire post order materials, develop or update post order manual
	X				BM, OM, CM	Conduct operational survey, risk analysis, and safety inspection
X					HR, OM	Create hiring profile- begin recruiting & staging to hire
	X				HR, BM, OM	Meet with interested incumbent personnel- screen & stage to hire
	X				RM, BM, HR, OM	Select site manager/supervisor/lead (as applicable)
	X	X			RM, BM, FST	Develop site-specific training materials
X	X	X	X		VP, RM, BM, OM	Procure supplies, equipment, and uniforms
		X	X		HR, OM, FST	Conduct branch office orientation & on-boarding for all new-hires
			X		HR, CM	Confirm personnel files against requisite checklist
		X	X		OM, FS, SFT	Conduct on-site training for new-hires & special response officers
			X		VP, RM, BM, OM	Finalize all unanswered questions and/or concerns
			X	X	All Applicable	Final staging- days/hours to job-start
			X	X	RM, BM, OM, FS	Arrival of account transition team
			X	X	BM, OM,	Placement of books, manuals, supplies, equipment, and technology
			X	X	BM, OM	Arrival of scheduled-to-work security personnel
			X	X	RM, BM, OM	Transition & custody exchange- between contractors (all property)
				X	RM, BM, OM	Begin services. Management will be present for each new-shift start
				X	RM	Post job-start review and evaluation among all stakeholders
Accountability Key						
VP - Vice President			HR - Human Resources Manager/Specialist			
RM - Regional Manager			CM - Compliance Manager/Specialist			
BM - Branch Manager			FS - Field Supervisor			
OM - Operations Manager			SFT - Staff and Field Trainer			



APPROACH CONTINUED

MANAGEMENT & KEY PERSONNEL

St. Moritz has structured our management resources to comply with all contract obligations, regulatory requirements, and the City of Key West service expectations.

CORPORATE LEADERSHIP

Matthew Schwartz, Chief Executive Officer

4600 Clairton Blvd. Pittsburgh, PA

Phone: 786.565.2393 | Email: mschwartz@smssi.com

- 21+ years of extensive security leadership experience
- Senior leadership positions with the nations largest security providers

Chris Hansen, Chief Operating Officer

4600 Clairton Blvd. Pittsburgh, PA

Phone: 713.542.5096 Email: chansen@smssi.com

- 40+ years of security leadership expertise
- Senior leadership positions accountable for multi-million dollar revenues and multi-state oversight

Kevin Smith, President of Commercial Services

4600 Clairton Blvd. Pittsburgh, PA

Phone: 412.885.3144 | Email: ksmith@smssi.com

- 30+ years of extensive security operations experience
- Marietta College, BS-Economics

**NEARLY 100 YEARS OF COMBINED
LEADERSHIP EXPERIENCE**



APPROACH CONTINUED

MANAGEMENT ASSIGNED TO THE CITY OF KEY WEST

The City of Key West security project will benefit from the knowledge of our local branch management led by **Lenny Neff, Regional VP; Pat Hurley, Regional Director of Business Development; and Joe Subic, Branch Manager.** Additionally, the corporate leadership will contribute to the security program's success with recruitment resources, administrative support, human resources, and training teams. The input they provide will add value in key operational areas such as reducing turnover, officer training, on-site training and supplies.

LENNY NEFF, REGIONAL VICE PRESIDENT



Lenny began his career in the protection industry in 2000 and brings both government and private sector experience to his role as Regional Vice President for St. Moritz. Before accepting this position, he held positions as a Counterintelligence Agent for the U.S. Army, Extradition Agent, Private Investigator, Security and Investigative Division and Director of Operations.

Lenny is highly trained in many security disciplines also holding a certification as a trainer in Management of Aggressive Behavior (MOAB). His Florida security licenses include "DI" License (trainer), "G" license (armed), and "M" License (Agency Manager). He is trained in counterintelligence, surveillance, interviews & interrogation, workforce management, search and seizure, traffic control and stops, terrorism awareness, risk mitigation, and operational leadership.

Lenny studied Criminal Justice at Palm Beach Community College and Crime Scene Technologies at Palm Beach State College. Lenny has experience in high-end community security programs. This includes the design and implementation of protection systems using perimeter protection to include thermal cameras with analytics, fence shakers, seismic ground sensors, ground-based radar, beam technology, and CCTV. These tools serve as real-time notifications to the security response units. Methods include unarmed, armed, K9, Marine Patrol, Paramedic Patrols, Traffic Enforcement, Bike, T3, and community patrols. These programs lead to the apprehension of criminals attempting to victimize residents. Lenny developed life safety programs to bridge gaps between Fire Rescue and the community by designing emergency extraction points in golf course communities.

PAT HURLEY, REGIONAL DIRECTOR OF BUSINESS DEVELOPMENT



Pat brings 25-years of security sales and management experience to his role as Regional Director of Business Development for St. Moritz. In this position, he develops new opportunities and fosters growth with new and existing partnerships. Pat's vast industry knowledge, residential security expertise, and close attention to client needs are critical to core operations. It is estimated that Pat has been the architect of over 350 residential security officer programs in his almost quarter-century of work experience in the security industry.

Pat's extensive experience in elite-level security has shaped and propelled progress within prior positions for vendor competitors. He is uniquely adept at developing and directing business vision strategies, having positively impacted growth in all areas of marketing and business development. Underpinning his development skills are his many years as a security operations executive, which lead him to found the Southwest Florida Chapter of ASIS (American Society of Industrial Security) and serve as its Chairman for several years. One of Pat's most cherished duties with St. Moritz is his role as our World Class Customer Service Trainer to our security officer staff members across the country.



APPROACH CONTINUED

PAT HURLEY BIO CONTINUED...

In October 2020, Pat was honored by Florida's Secretary of Agriculture by being appointed to the prestigious **PIRSAC Council** which oversees the security, private investigation, and recovery industries, and advises the State of Florida on legislative and regulatory issues impacting these industries. This very sought-after appointment is an acknowledgment that Pat stands among the elite of the security industry and confirms his reputation and expertise in security within the State of Florida. He will serve in this position until October 2024.

Prior to his successful career in security, Pat was renowned broadcaster, both on television and radio. He was simultaneously a TV News Anchor in Miami and the host to his own talk radio show "The Pat Hurley Show," which became a weekend staple and #1 in its time slot.

In the State of Florida, Pat holds a Security Agency Manager License (MB), and a Private Investigator License (CC). Pat majored in Broadcast Journalism at Valdosta State University and also studied Communication and Media Studies at Broward College. He is now a retired martial arts instructor, having achieved the title of Sensei in the Japanese art of Shito-ryu Karate.

JOE SUBIC, BRANCH MANAGER



Joe is the Branch Manager for St. Moritz's Florida portfolio. He brings over 20 years of progressive law enforcement experience gained through a distinguished career in security, law enforcement and the military. He served as Chief of Police in two separate Florida Municipalities.

Joe has a background with extensive management, administrative, and operational experience. His expert experience consists of leading assignments and client projects, supporting regional operational goals, risk mitigation, and loss prevention. He is a hands-on manager always available to clients to discuss security needs and answer questions as he is directly involved in all aspects of daily service.

Joe is a graduate of the FBI National Academy and Florida's Criminal Justice Executive Institute's Chief Executive Seminar. He is a retired combat veteran of the United States Army serving over 20 years both on active duty and with the reserves. His military assignments have included tours with the US Army Special Forces; the 82nd Airborne Division; the US Army Criminal Investigations Division (CID). During Operation Iraqi Freedom, he commanded a 49-person Protective Services Detail (PSD) during 18 months of active combat. His military awards include two Bronze Star Medals; the Meritorious Service Medal; the Joint Service Commendation Medal with "valor" device; three Army Commendation Medals; and four Army Achievement Medals.

Joe holds a Master Degree Certificate in Criminal Justice from the University of Virginia and a Bachelor of Arts Degree in Criminal Justice from St. Thomas University.



APPROACH CONTINUED

FIELD SUPERVISION & SITE SUPPORT TOOLS

St. Moritz strives to provide added value, while supporting our client's business goals and keeping their budget in mind. We use our resources and technology solutions to address the rising costs of the security profession.

One way we add value is by providing a field supervision team to spearhead the training and provide added personnel oversight. Within each branch office, the field supervisors act as non-resident supervisors. They provide training to the officers assigned to each facility and are an essential part of the management team.

Valued-added tasks performed by field supervisors include:

● **POST CHECKS**

St. Moritz field supervisors schedule visits with each post and monitors the quality of the on-site program. They evaluate standards such as performance and uniform appearance.

● **ON-SITE TRAINING**

Field Supervisors conduct on-site training sessions, reinforce basic security methods, and conduct on-the-spot quiz exams of the post orders to ensure base knowledge.

● **INCIDENT REPORTS**

Field supervisors support officers by reviewing Incident Reports and assisting in investigations. A report regarding the incident is left for the on-site client representative to review.

● **INSPECTION REPORTS**

Field supervisors conduct site inspections and leave reports for the client representative (as requested).



Know your Facilities are **SECURE**
with our Field Supervision Team



APPROACH CONTINUED

VETTING & PERSONNEL SELECTION

HIRING PERSONNEL

Hiring excellent employees is important. After completion of all screening processes, an applicant will undergo a comprehensive interview with human resources and/or the responsible operations representative. The interview is designed to ensure that each applicant is not only "best matched" with each job. ALL applicants are assessed for their experience, skills, and interest in the job. Additional considerations include capability to perform the specific responsibilities, work schedule, and work location in relation to applicants commute. Fundamentally speaking, the skills required by security professionals deployed in commercial real estate are be different than the skills required by security professionals deployed in an industrial, residential, or retail environment.

MINIMUM QUALIFICATIONS

- High school diploma or equivalent
- U.S. citizen or legal work permit
- No convictions, no dishonorable or undesirable military discharges or pattern of undesirable behavior (not limited to; driving record or employment record.)
- 18 years of age or older
- Current (State) resident driver's license
- Pass the federal and state criminal background security checks
- Speak, read, and write in English fluently
- Previous experience meeting and dealing with the general public
- Ability to maintain poise and self-control under stress
- Ability to construct and write clear, concise, and accurate reports
- Physically in good health and able to perform all the aspects of the position
- Current security license or ability to obtain one
- Current TWIC card or ability to obtain one
- Basic computer skills; able to use online & other computer programs
- Clean, well-groomed appearance
- Well-developed level of maturity & interpersonal skills

SCREENING PROCEDURES

Minimum Screening:

- Criminal background check
- Personal background check
- Employment history verification
- Drug screening
- Motor vehicle driver's history check
- Reference check
- Physically capable of performing all functions of the post requirements



APPROACH CONTINUED

SCREENING-BACKGROUND

Critical selection protocol provides the foundation for the future success of every officer candidate. Our selection process is directed to the best possible person being hired for the City of Key West. Applicants' employment eligibility is first checked through the national data base e-Verify, and then moved through the phases of screening; background, job verification, fingerprints, and drug screen.

BACKGROUND SCREENING

*Backgroundchecks.com

St. Moritz utilizes Backgroundchecks.com for candidate background checks. Each **US AliasSEARCH** report includes:

- Multi-jurisdictional database search of public criminal records on provided primary name and developed names
- Offender registry check of records from all 50 states
- Terrorist watch list (such as OFAC)
- Social security number (SSN) validation
- SSN check against the death master index
- Development of names from name and address history
- Address history
- Check records 7 years back, 18+ years of age records



With a **US AliasVERIFY** check, we will not only search more than 650 million criminal records from counties, departments of corrections (DOC), administrative Office of courts (AOC) and offender registries from all 50 states, plus Washington DC, Guam, and Puerto Rico for the provided and alias names found, but will also verify criminal matches directly at the source before reporting them, updating the record to match currently available public records, completing incomplete records, and allowing reporting of records that become legally reportable based only on the updated and complete record.

NOTE: The background checks include complete Florida Department of Law Enforcement (FDLE) and FBI checks to include both In/out-of-state on all staff assigned to the City of Key West project.

DRIVING RECORD

- St. Moritz will require proof of driver's license and driving history for each of the employees (assigned to driving positions).
- A copy of the driving record will be obtained from the Florida Highway Safety and Motor Vehicles/Division of Motorist Services




APPROACH CONTINUED

FINGERPRINTS

IDENTOGO FINGERPRINTING

SMSSI is partnered with IdentoGO. They utilize the best latest technologies developed by IDEMIA for speed and precision. Thier staff ensure maximum efficiency and convenience. (IDEMIA meets the growing need for real-time identification of suspects and criminals, and has developed MBIS - a comprehensive range of products centered on an innovative Automated Biometric Identification System.)




E-VERIFY

E-VERIFY

E-Verify is an Internet-based system that compares information from the candidates Form I-9, Employment Eligibility Verification, to U.S. Department of Homeland Security (DHS) and Social Security Administration (SSA) records to confirm that the person is authorized to work in the United States.


Items required for officers to comply with St. Moritz employment: Driver's license, passport photos, letters of character reference, proof of clearance of criminal background check, and fingerprint cards.



MAINTAINING A DRUG-FREE WORKFORCE

Our standard employment practice provides for five panel, company managed (oral swab by certified technician) pre-employment screening. Additional screening is conducted using a NIDA certified operation including on-site screening management by certified techs.

Screening is part of the on-boarding process and is zero tolerance. Random periodic screening is conducted at the site or project level in accordance with local policy and contract requirements. Screening for cause occurs any time that an employee related accident results in hospitalization including emergency out-patient or any event involving an employee driven vehicle on-the-job, and whenever an employee is obviously incapacitated on-the-job by drug or alcohol related impairment.

5-Panel Drug Screen 

5-panel drug screens test for the following substances:

Substance	Initial Screening	Confirm
Cannabinoids	10 ng/ml	15 ng/ml
Cocaine Metabolite	300 ng/ml	150 ng/ml
Opiates/Heroin	200 ng/ml	50 ng/ml
Amphetamines	100 ng/ml	50 ng/ml
Methamphetamine	1000 ng/ml	50 ng/ml

*Standard panel



APPROACH CONTINUED

TRAINING

When it comes to building a quality security team, the right training makes all the difference. With operations across the country, St. Moritz has the expertise and the resources to meet your requirements for quality security and training. It is proven that quality-trained security personnel makes better long-term, dedicated employees. At St. Moritz, our training goes beyond an introduction to basic security knowledge. Our thoughtfully designed on-the-job, web-based, and ongoing training programs are designed for all members of the St. Moritz Security team—from officers to executives. Concentrated training of all St. Moritz staff across the company makes us a stronger security partner.

St. Moritz Security will provide properly trained officers to protect the interests of the City of Key West . We will provide a comprehensive, training program for St. Moritz Security officers assigned to your property. Our program includes these modules:

MODULE	DESCRIPTION
--------	-------------

The Initial Training Program intended for use by all Security Guards, Supervisors, and Managers as a formal Introduction to Security. This module establishes a standard of basic training and is supplemental to, any such lesser standard or lack thereof, that may be required or endorsed by a state mandate or company protocol.

INITIAL TRAINING



Delivered in classroom or via SMSSI's eLearning Center. The following topics may vary due to state mandatory training & licensing:

- Orientation, Policies & Procedures
- Basic Officer Duties
- Communication (verbal & written)
- Methods of Observation, (Detect, Deter, Observe and Report)
- Reporting (Types and Methods)
- Local Government & Legal Limitations
- Fire Prevention (characteristics, prevention, detection, and response)
- Safety Hazards, Emergency Response & Evacuation
- Public Relations & Customer Service
- Department (Uniforms, Conduct, and Equipment)
- Communications (verbal and written)
- Defusing Conflict and Crisis
- Roves & Mobile Assignments (foot/vehicular)
- Professionalism, Ethics, and Business Conduct
- Sexual Harassment Awareness & Sensitivity



APPROACH CONTINUED

MODULE

DESCRIPTION

THE CITY OF KEY
WEST
POST ORDERS & OJT
TRAINING

(16 HOURS)




Once officers complete basic training they will complete on-the-job training which will consist of the following:


- Security Procedures-Review Post Instructions
- History, Orientation, and Familiarization
- Chain of Command & KWPD
- Emergency Procedures and Post Policies
- Enforcing parking regulations
- Foot Roves, technique & patrol
- Responding, recording, and coordination of incidents
- Surveillance and monitoring
- TrackTik, cell phone or two-way radio procedures
- Facility lock down procedures
- Public Relations Policies
- Lost and found procedures
- Dealing with disturbances
- Unregistered vessels documentation procedures
- City's time clock to check in and out
- Inspection of Marine Facility sites in order to reconcile "Dock Check List"
- Relief policies
- Written forms, reporting, daily reports, and incident reports
- Safety at each post and assignment

St. Moritz Training programs prepare officers **BEYOND** the just basics.



APPROACH CONTINUED

MODULE	DESCRIPTION
<p>SPECIALIZED TRAINING</p> 	<p>Specialized or site required training is outlined to include the following for the City of Key West</p> <ul style="list-style-type: none"> • Active Shooter • CPR/AED/First Aid

MODULE	DESCRIPTION
<p>RECURRENT TRAINING</p> 	<p>Annually, St. Moritz will provide a training based on best practices, remedial training, or newly implemented policies, regulations, laws, or procedures. This training will be created, presented and tracked by St. Moritz management team. In conjunction the City of Key West we will determine specific critical skills & knowledge to reinforce.</p> <ul style="list-style-type: none"> • Compliance with all state required refresher training (annually, or as needed) • CPR/AED/First Aid (annually)



On-going Training for the Safest City Facilities



APPROACH CONTINUED


ADVANCED SECURITY CAREER EDUCATION

Education is powerful. St. Moritz has partnered with Private Security Professionals of America® (PSPA) to offer our personnel unlimited, advanced security education and certifications. Officers and supervisors are eligible to take courses in various security disciplines through this accredited online learning forum. All student certifications and classes are pre-paid by St. Moritz. This investment in our employee's on-going career development benefits our clients by creating security professionals with advanced skills and increased tenure at no additional cost to our clients.

When it comes to building a quality security team, the right training makes all the difference. With operations across the country, St. Moritz has the expertise and the resources to meet your requirements for quality security training.

FACT

PSPA CERTIFICATES OF COMPLETION ARE ACCEPTED BY BOTH PUBLIC AND PRIVATE ORGANIZATIONS AS CONTINUING EDUCATION UNITS (CEU'S).

MODULE	DESCRIPTION
<p>ADVANCED LEARNING</p> 	<p>Continuing Professional Development (CPD) provider recognized by:</p> <ul style="list-style-type: none"> ▪ Building Owners and Managers Association (BOMA/BOMI) ▪ Real Property Administrator RPA® ▪ Facilities Management Administrator FMA® ▪ Systems Maintenance Administrator SMA® ▪ Systems Maintenance Technician SMT® <p>Continuing Education (CE) provider recognized by:</p> <ul style="list-style-type: none"> ▪ American Society for Industrial Security ASIS® ▪ National Domestic Preparedness Coalition NDPC® ▪ National Sheriff's Association NSA



APPROACH CONTINUED

TECHNOLOGY AND SERVICE FEATURES

Serving clients nationwide requires a technology infrastructure to support thousands of people actively engaging our services. To this end, we maintain a comprehensive technology platform through TRACKTIK® to enhance our competitive edge through superior electronic communications. Our customized platform connects our front-line security professionals to our management team and back-office administrators, while simultaneously providing clients with invaluable real-time reporting.

Our customized TrackTik platform is a software solution that allows stakeholders to follow real-time activities of on-duty security personnel thereby increasing response times while reducing if not eliminating manual tasking, paper-trailing and delayed reporting.



SMARTPHONES ALLOW OFFICERS TO COLLECT DATA IN THE MOMENT AND SHARE IT IN REAL-TIME TO YOUR CLIENT EXCLUSIVE PORTAL



EQUIPMENT REQUIREMENTS

Equipment requirements are simple; a standard Smartphone and/or Electronic Tablet equipped with the TRACKTIK mobile application begins our process. Baseline as well as custom-tailored applications will be loaded and made available to users based upon user profile and/or assignment.

HANDHELD TECHNOLOGY

A standard Smartphone and/or Electronic Tablet (once programmed) will be utilized to collect analytics and related metrics from reports generated by on-duty personnel. These analytics will provide insight into the types of incidents that happen, when they occur, and where on your site they take place.

Supplemental data can be acquired, interpreted by our management team, and provided as requested. We can discuss our base and supplemental reports with clients during regular meetings or during a formal business review. Analytics produced allow stakeholders to improve security, increase protection, accommodate needs, or conversely compile and analyze results for other reasons to include internal and external areas of responsibility.



APPROACH CONTINUED

MANAGEMENT TOOLS TO IMPROVE SERVICE DELIVERY



COMPREHENSIVE REPORTING

- Displays data on a client dashboard and is instantly viewable
- Provides shift reports & DARs to track daily activities at a specific location
- Provides client representatives with information on issues as they occur



ALERTS & NOTIFICATIONS

- Alert officer to time sensitive messages & notifications (BOLOS)
- Alerts officer about reoccurring tasks
- Confirms receipt of all messages, tasks, and notification deliveries



GEO-LOCATION

- Provides GPS position of officer
- Tracks predesignated roves
- Geo-fencing alerts supervision if officer is out of authorized area

EASILY communicate with
ALL officers at your site



APPROACH CONTINUED

EFFICIENT TIME & ATTENDANCE TRACKING = INCREASED BILLING ACCURACY



SCHEDULING, PAYROLL & INVOICING

- Invoicing & payroll is generated directly from time & attendance data
- Accurate Invoices & payroll
- Speeds time to generate paychecks
- Avoids manual data entry errors
- Scheduling managed by site supervisors in cloud-based system
- Avoids scheduled overtime
- Schedules only qualified officers that meet training requirements



TIME & ATTENDANCE

- Officers log in at the start of each shift creating a digital time stamp with GPS location marker
- End of shift log outs port data directly into cloud-based payroll/invoicing system
- Failure to log in/out alerts to supervisors & management for action


Customized Incident Analytics Reports
Give you a **CLEAR & COMPREHENSIVE** View
of Your Security **RISKS & VULNERABILITIES**




APPROACH CONTINUED

EXAMPLE OF A DAILY ACTIVITY REPORT

Daily Activity Reports will be completed to log all security activities. These reports are spelled checked, written "in-the-moment", and records all duties completed. These reports provide consistent activity input, are useful, and are in an easy-to-read format.









ABC BUILDING DEMO
290 Main Street
State College, PA 16801



Daily Activity Report

Daily Activity Report	
Location:	North Parkway – East Wing
Report Date:	October 17, 2019
Report Time:	06:00
Created By:	Officer: Tim Knight
Position:	East Gate Officer

Time	Action	Details												
0705	Inspected fire extinguisher seal on 3 rd floor West Hall near office 3A. Found the seal to be broken. Seal # 88011 0709 Notified manager Tina Leavy. Prepared incident report.	<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%;">Location</td> <td>W. Hall</td> <td style="width: 20%;">Seal # 88011</td> <td style="width: 40%;">Incident Report #987123</td> </tr> <tr> <td>Officer:</td> <td>Tim Knight</td> <td></td> <td style="text-align: center;"></td> </tr> <tr> <td colspan="4" style="text-align: center;"></td> </tr> </table>	Location	W. Hall	Seal # 88011	Incident Report #987123	Officer:	Tim Knight						
Location	W. Hall	Seal # 88011	Incident Report #987123											
Officer:	Tim Knight													
														
0709	Continued rove to 4 th floor													
0712	All Floor clear and ready for lock-up.	Notified building engineer that last rove is complete												
0715	Returned to Lobby 1 st floor													
0725	Officer M. Smithson called to report "on rove"	Rove route B Rove of "K-M" buildings												
0728	Approved vendor for entry. Contacted Benjamin at the main office to verify.	Vendor Name: Office Supplies R Us Host: Ben James Destination: Main Office West												
0745	Prepared report #987123 on extinguisher													
0749	Cleared for exit													
0752	Andy Coffee employee on 3 rd floor forgot pass key- Cleared	Personnel: Employee Andy Coffee Destination: Main Office West												
0800	Officer M. Smithson called to report "off rove" and is back in the Main Office West													

DAILY ACTIVITY REPORT FEATURES

- Descriptive, but simple reporting
- Easy navigation & reader format
- Searchable, by key words
- Collects metrics & analytics
- Include photo or videos
- Customizable report templates
- Easily archived & retrieved



APPROACH CONTINUED

EXAMPLE OF AN INCIDENT REPORT

Incident Reports (IR) are completed by officers when an event occurs. This can include anything out of the ordinary; an accident, altercation, fire, etc. Incident reports never include opinions. Officers are trained to write factual documents with the understanding that they can be used as legal documents. IRs need to be as detailed as possible and free of assumptions. St. Moritz IR's are completed electronically using the TrackTik reporting solution. Below is a sample report.

TrackTik
4900 St Laurent
#445
Montreal QC H2W2R2

Golden Gate Community
33 Avenue Damaged
Pointe-Claire QC H9R 2V7

TRACKTIK

Report # [REDACTED]
Report Date 08/18/2017
Report Time 08:50pm
Created By Johnny Smith #1000
Client 8800-001

Incident Details

Select Date: 08/18/2017
Select Time: 08:50pm
Incident Location: Pointe-Claire, QC, H9R 2V7
Incident Type: Water line in the basement
Is the situation represented as hazardous? No

Narrative:
During last patrol resident, Dawna Springs, approached me asking for assistance with a leak in her basement. I entered the premises and located the leak near the water tank. A significant amount of water had pooled in the basement. At her request, the main water accumulator was out and plumbing company contacted. They will come this evening to repair the pipe.
Dawna will contact the main gate to provide the name of the plumbing and cleaning companies who will be responsible for clean up and repairs.

Photo 1

Car Damage Map

Vehicle Data
Driver Name: SM
License Plate #: [REDACTED]
Vehicle Type: [REDACTED]

Vehicle Accident Narrative
Driver returned to the vehicle in the garage and noticed the damage to the right rear fender. They were parked on floor A, stall 258. Camera footage requested.

Body Injury map

Person Data
Name, phone number, email: [REDACTED]
Injury Narrative
Fall on stairs in the East stairwell. She said she was taking the stairs for "extra exercise". Fell on last step. Injury to wrist and knee. No medical aid was contacted at the request of the individual.

Officer Signature
Nathan Schindler

©2017 St. Moritz Security Services

INCIDENT REPORTS ARE HIGHLY CUSTOMIZABLE DOCUMENTS:

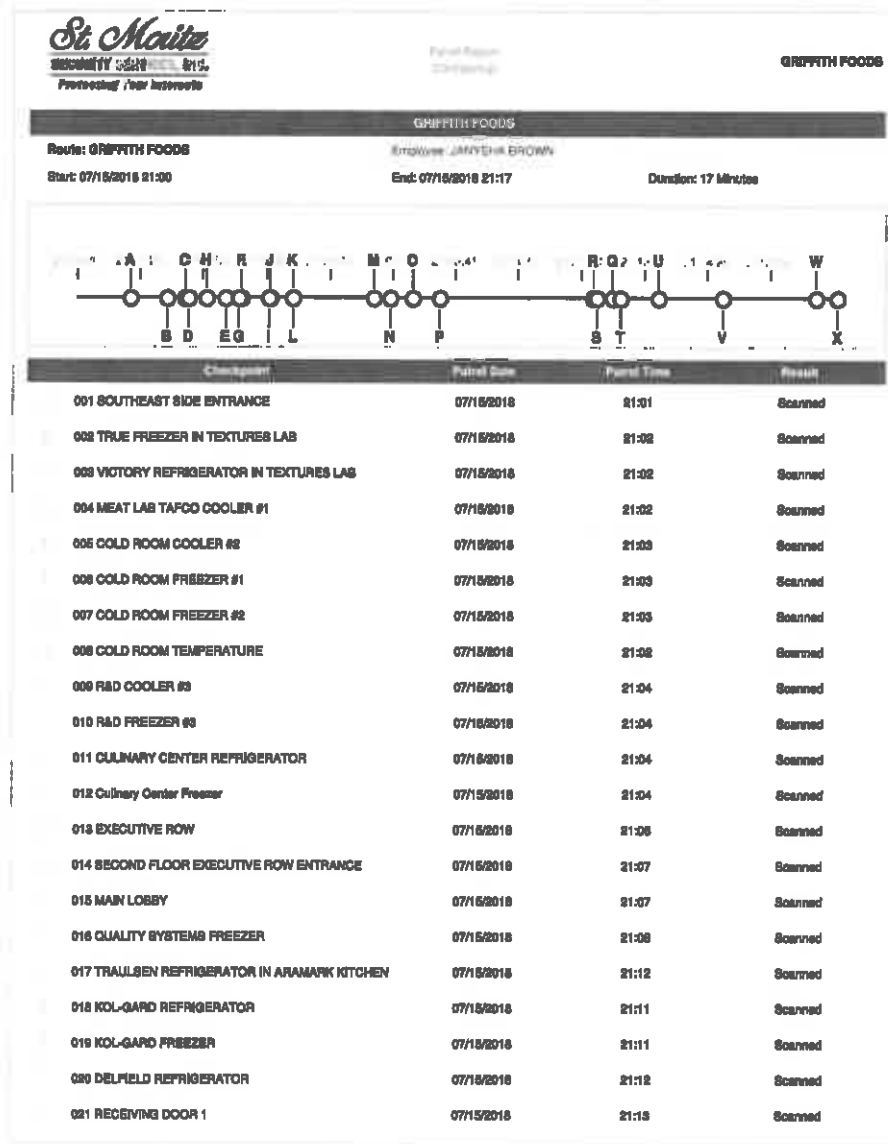
- All fields customizable
- Voice-to-text capable fields
- QR Code
- Unique report number generated
- Date, time & officer name + official signature field
- Attach Picture documentation
- Customizable incident categories drop-down menus
- Vehicle damage map
- Bodily injury map
- Golf cart damage map
- Driver's License Bar code scanner



APPROACH CONTINUED

GUARD TOUR REPORT EXAMPLE

Establish digital checkpoints for officers to scan while on patrol. A report is generated to ensure all checkpoints are physically visited and inspected.



REPORT FEATURES:

- START OF TOUR
- END OF TOUR
- WHO PERFORMED
- TIMESTAMP
- CHECKPOINT
- RESULT OF SCAN



APPROACH CONTINUED

QUALITY ASSURANCE PROGRAM

It is our goal to be the **FIRST CHOICE** of our clients and employees. Our definition of quality service is meeting and exceeding customer expectations for both service and value. We believe it all starts and ends with our security officers. It is our security officer's professionalism, competence, and commitment that ultimately make the difference.

✓ QUALITY ASSURANCE AUDITS

Quality Assurance Audits comprise the solicitation of customer feedback and candid discussions regarding our overall performance. Audits include solicited feedback from our management team and our field employees assigned to each worksite. We also conduct regular and at-random audits of all internal and external operational processes. These audits include client-specific: policies, procedures, contract provisions, worksite training programs, worksite instruction manuals, and employee performance & compliance, to name just a few. In the end, deficiencies suspected or detected are investigated and resolved to best meet contracted guidelines.

✓ FIELD INSPECTIONS

We conduct scheduled and at-random quality assurance inspections to best ensure on-duty employees are meeting site-specific compliance directives. Our Security Operations Center (which operates 24 hours a day, 7 days a week) supplements our local team to further ensure quality control, quality assurance, corporate governance, and supervisory support, at all times.

✓ SATISFACTION SURVEYS

Customers (clients and employees alike) are surveyed, via formal questionnaire, and asked to rank our overall services in an effort to ensure we meet if not exceed expectations. In the end, deficiencies suspected or detected are investigated and resolved to best meet contracted guidelines.

✓ BUSINESS REVIEWS

We offer Business Reviews (quarterly or biannually) where we meet with the City of Key West representatives to discuss performance in relation to expectations. In preparation for the meeting we will conduct a self-imposed Performance Evaluation (PE) designed to measure and evaluate our work results. The will include a list of Key Performance Indicators (KPI's) - a set of quantifiable measurements used to assess our performance in achieving your goals for security. The KPI comprises pre-set goals to include, but not be limited to:

KEY PERFORMANCE INDICATORS

- Response Times
- Turnover
- Budget
- Management/Supervision
- Reports & Accuracy
- Proactive Issue Resolution
- Officer proficiency
- Time & Attendance
- Officer Performance Reviews
- Safety
- Training
- Compliance



APPROACH CONTINUED

QUALITY ASSURANCE - EMERGENCY RESPONSE PREPAREDNESS

✓ PROTECTING CLIENTS

Part of the quality control program is planning for and protecting out clients during crisis. The unpredictable nature of a crisis means the City of Key West will need a well-planned response during unforeseen events. Whether it's a storm, a power outage, fire, or act of terrorism — St. Moritz is ready to respond with the support and leadership you need.



During increased threat levels, imminent danger, natural disaster and catastrophic events, the City of Key West needs a partner with the proven ability and available resources to support increased levels of coverage, especially at a moment's notice. St. Moritz employs 3,000+ security officers, supervisors, and management personnel. This means the City of Key West will always have trained, experienced, officers available.

St. Moritz will maintain a flex pool of cross-trained, response officers. Overtime coverage is managed from the local branch during an emergency, with all plans coordinated through SOC. Local law enforcement and emergency response communication is also coordinated through SOC.

GENERAL BACK-UP & EMERGENCY COVERAGE

St. Moritz will maintain a pool of cross-trained response & backup officers to provide additional coverage. These officers will act as replacement personnel to cover during call-offs, vacation, or unexpected separations of employment.

Officers will remain on-duty until properly relieved by other security personnel. The City of Key West, will only be billed for hours worked, and billed overtime if an officer must hold post to wait for relief personnel.

DISASTER & CRISIS MANAGEMENT

St. Moritz Security manages disaster and emergency response requests nearly everyday. You will be reassured knowing we act quickly and assist with the following:

- Activate emergency response plans
- Provide additional staff to meet increased staffing requirements
- Establish communication systems
- Lead evacuations
- Establish Command Center
- Coordinate & direct emergency responders
- Direct media to a designated location



REFERENCES

KEYS GATE COMMUNITY ASSOCIATION

1541 SE 12th Avenue, Homestead, FL 33034

Annual Contract Value: 1.5 million
Contract Term: January 1, 2020 – December 31, 2022
Contact: Ignacio Mendez, Senior Property Manager
Phone: (305) 247-9800 Ext. 205
Email: lmendez@miamimmanagement.com



DESCRIPTION SUMMARY: Security and patrol services. Officers provide a visual deterrent to unwanted activities, check identification, maintain visitor lists, open/secure gates, monitor traffic, parking controls, emergency response, and provide resident and visitor assistance. Officers enforce community rules and regulations to keep residents safe.

PENNSYLVANIA DEPT OF LABOR & INDUSTRY, WC OFFICE OF ADJUDICATION

1010 N 7th Street, Suite #319, Harrisburg, PA 17102

Annual Contract Value: \$1,196,000
Contract Term: 1/2017-On-going
Contact: Brandy Keeney
Phone: (717) 425-7590
Email: bkeeney@pa.gov



DESCRIPTION SUMMARY: Security to the courtroom. Officers post outside of chambers and monitor all individuals entering the courtroom. Officers use handheld wand to screen visitors, conduct bag searches and prevents prohibited items from being brought into the facility.

PENN STATE UNIVERSITY

112 Shields Building, University Park, PA 16802

Annual Contract Value: \$800,000+
Contract Term: 1998-Current
Contact: Sgt. Monica Himes ICA Liaison Officer, Email: mmh171@psu.edu
Contact: Asst. Chief is William Moerschbacher, Email: wxm10@psu.edu
Contact: Lt. Matthew White, Email: mrw162@psu.edu



DESCRIPTION SUMMARY: University police and public safety security services. Officers provide access control, coverage for athletic events, parking, and traffic control, armed cash escorts, and security coverage at University Park Airport.



REQUIRED FORMS

(Not counted towards 20 sheet limit):

In this section:

- Bid Form
- Non-Collusion Affidavit
- Anti-Kickback Affidavit
- Sworn Statement under section 287.133(3)(a) Florida Statutes, on public entity crimes
- City of Key West Indemnification Form
- Local Vendor Form
- Domestic Partnership Affidavit
- Cone of Silence Affidavit
- Proof of Insurance
- A description of any previous or existing legal action against the Bidder within the past three (3) years. If none, Bidder shall state this fact in writing.



REQUIRED FORMS

Professional, Personable & Reliable—our teams support your protection goals.

St. Moritz
SECURITY SERVICES, INC.



BID FORM

Notice to Bidder: Use Black Ink or Type For Completing the Form.

BID FORM

To: CITY CLERK
CITY OF KEY WEST, FLORIDA
1300 WHITE STREET
KEY WEST, FLORIDA 33040

Project Title: CITY OF KEY WEST PRIVATE SECURITY SERVICES,

Project No.: RFP No. 005-21

BIDDER'S INFORMATION

Name: St. Moritz Security Services, Inc.

Address: 3350 SW 148th Avenue, Suite 110
Miramar, FL 33027

Contact Name: Pat Hurley

Email: phurley@smssi.com

Telephone: (239) 537-1711

Fax: none



PORT AND MARINA SECURITY SERVICES

The security services for each facility is outlined in the Scope of Work section

LOCATION	UNBURDENED HOURLY RATE (\$)¹	RATE IN WORDS	BURDENED HOURLY RATE (\$)²	RATE IN WORDS
Key West Bight/ Key West Bight Ferry Terminal³	\$18.00/hr*	Eighteen dollars per hour	\$25.95/hr*	Twenty-five dollars and ninety-five cents/per hour
City Marina⁴	\$18.00/hr**	Eighteen dollars per hour	\$25.95/hr*	Twenty-five dollars and ninety-five cents/per hour
Key West Bight Ferry Terminal⁵	\$18.00/hr*	Eighteen dollars per hour	\$25.95/hr*	Twenty-five dollars and ninety-five cents/per hour

¹ Direct Labor Cost.

² Direct Labor Cost, O/H, G&A, Profit.

³One (1) guard from 6:00 pm until 6:00 am Monday – Friday, One (1) guard from 6:00 am Saturday – 6:00 am Monday

⁴One (1) guard daily from 5:30 PM until 5:30 AM.

⁵One (1) guard from 3:00 pm until 6:00 pm. Monday – Sunday or when Key West Express is docked at the ferry terminal facility.

***Note: Pricing is valid for the first 12 months of any agreement with the City of Key West, as long as the start date is no later than August 30, 2021. Subsequent “option years” will require a negotiated adjustment to the provided rates.**



SUBCONTRACTORS

SUBCONTRACTORS

The Bidder further proposes that the following subcontracting firms or businesses will be awarded subcontracts for the following portions of the work in the event that the Bidder is awarded the Contract:

Portion of Work: Not applicable - St. Moritz will self-perform

Name: _____

Address: _____

Portion of Work: _____

Name: _____

Address: _____

Portion of Work: _____

Name: _____

Address: _____

BIDDER

The name of the Bidder submitting this Bid is: St. Moritz Security Services, Inc.

Doing business at 3350 SW 148th Avenue, Suite 110
Miramar, FL 33027

Telephone No. (239) 537-1711.

This address is where all communications concerning this Bid shall be sent.

Name

Title

Pat Hurley, Regional Director of Business Development

3350 SW 148th Avenue, Suite 110, Miramar, FL 33027

Phone: (239) 537-1711



The names of the principal officers of the Corporation submitting this Bid, or of the Partnership, or of all persons interested in this Bid as Principals are as follows:

Name	Title
<u>Matthew Schwartz</u>	<u>CEO</u>

If Corporation

IN WITNESS WHEREOF the undersigned corporation has caused this instrument to be executed and its seal affixed by its duly authorized officers this 22nd day of May, 2021

(SEAL)

Name of Corporation

By: Matthew Schwartz

Title: Chief Executive Officer

Attest: 
Secretary

If Sole Proprietor or Partnership

IN WITNESS hereto the undersigned has set his/her/its hand this 22 day of May, 2021

Signature of Bidder: 
Title Chief Executive Officer



NON-COLLUSION AFFIDAVIT

NON-COLLUSION AFFIDAVIT

STATE OF WASHINGTON)
:
SS COUNTY OF KING)

I, the undersigned hereby declares that the only persons or parties interested in this Proposal are those named herein, that this Proposal is, in all respects, fair and without fraud, that it is made without collusion with any official of the Owner, and that the Proposal is made without any connection or collusion with any person submitting another Proposal on this Contract.

By: Matt C. Adams

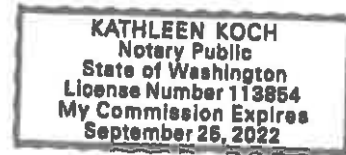
Sworn and subscribed before me this

22nd day of May, 2021.

Kathleen Koch



NOTARY PUBLIC, State of Washington My



Commission Expires: 9/25/2022



ANTI-KICKBACK AFFIDAVIT

ANTI - KICKBACK AFFIDAVIT

STATE OF Washington)
 : SS
COUNTY OF King)

I, the undersigned hereby duly sworn, depose and say that no portion of the sum herein bid will be paid to any employees of the City of Key West as a commission, kickback, reward or gift, directly or indirectly by me or any member of my firm or by an officer of the corporation.

By: Matthew Schwartz
Matthew Schwartz, Chief Executive Officer, St. Moritz Security Services, Inc.

Sworn and subscribed before me this 22nd day of May, 2021.

Kathleen Koch [Signature]
NOTARY PUBLIC, State of _____ at Large

KATHLEEN KOCH
Notary Public
State of Washington
License Number 113854
My Commission Expires
September 25, 2022

My Commission Expires: 9/22/2022
22nd day of May, 2021.

**CITY OF KEY WEST PRIVATE
SECURITY SERVICES**



SWORN STATEMENT, FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

SWORN STATEMENT UNDER SECTION 287.133(3)(A)
FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid or Proposal for:

City of Key West

2. This sworn statement is submitted by St Moritz Security Services, Inc.
(Name of entity submitting sworn statement)

whose business address is 3350 SW 148th Avenue, Suite 110

Miramar, FL 33027

and (if applicable) its Federal Employer Identification Number (FEIN) is 25-1419674

(If the entity has no FEIN, include the Social Security Number of the individual signing this sworn statement _____)

3. My name is Matthew Schwartz
(Please print name of individual signing)

and my relationship to the entity named above is Chief Executive Officer

4. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including but not limited to, any bid or contract for goods or services to be provided to any public or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means



- a. A predecessor or successor of a person convicted of a public entity crime; or
- b. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.
7. I understand that a "person" as defined in Paragraph 287.133(1)(8), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies).

Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor any affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989, AND (Please indicate which additional statement applies.)

There has been a proceeding concerning the conviction before a hearing of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer did not place the person or affiliate on the convicted Proposer list. (Please attach a copy of the final order.)

The person or affiliate was placed on the convicted Proposer list. There has been a subsequent proceeding before a hearing officer of the State of

Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in the public interest to remove the person or affiliate from the convicted Proposer list. (Please attach a copy of the final order.)

The person or affiliate has not been put on the convicted Proposer list. (Please describe any action taken by or pending with the Department of General Services.)



Matthew C. Adams

(Signature)

5/22/2021

(Date)

STATE OF Washington

COUNTY OF King

PERSONALLY APPEARED BEFORE ME, the undersigned authority,

Matthew Schwartz who, after first being sworn by me, affixed his/her
(Name of individual signing)

Signature in the space provided above on this 22nd day of May, 20 21.

My commission expires: 9/25/2022

[Signature]

Kathleen Koch, NOTARY PUBLIC

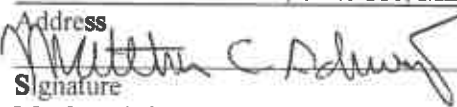
KATHLEEN KOCH
Notary Public
State of Washington
License Number 113854
My Commission Expires
September 25, 2022



CITY OF KEY WEST INDEMNIFICATION FORM

CITY OF KEY WEST INDEMNIFICATION FORM

To the fullest extent permitted by law, the Proposer expressly agrees to indemnify and hold harmless the City of Key West, their officers, directors, agents and employees (herein called the "indemnitees") from any and all liability for damages, including, if allowed by law, reasonable attorney's fees and court costs, such legal expenses to include costs incurred in establishing the indemnification and other rights agreed to in this Paragraph, to persons or property, caused in whole or in part by any act, omission, or default by Proposer or its subcontractors, material men, or agents of any tier or their employees, arising out of this agreement or its performance, including any such damages caused in whole or in part by any act, omission or default of any indemnitee, but specifically excluding any claims of, or damages against an indemnitee resulting from such indemnitee's gross negligence, or the willful, wanton or intentional misconduct of such indemnitee or for statutory violation or punitive damages except and to the extent the statutory violation or punitive damages are caused by or result from the acts or omissions of the Proposer or its subcontractors, material men or agents of any tier or their respective employees.

Proposer: St. Moritz Security Services, Inc.
3350 SW 148th Avenue, Suite 110, Miramar, FL 33027
Address

Signature
Matthew Schwartz
Print Name
Chief Executive Officer
Title



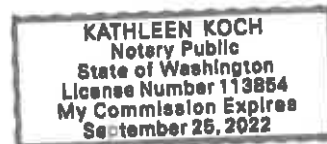
DATE: 5/22/2021

Sworn and subscribed before this 22nd day of May, 2021

NOTARY PUBLIC, State of Washington, at Large

My Commission Expires: 9/25/2022





Kathleen Koch, NOTARY PUBLIC



LOCAL VENDOR CERTIFICATION

A sub-station location meeting the City of Key West's requirements will be established if awarded the business. We currently operate a substation in Homestead, Florida as well.

LOCAL VENDOR CERTIFICATION PURSUANT TO CITY OF KEY WEST ORDINANCE 09-22 SECTION 2-798

The undersigned, as a duly authorized representative of the vendor listed herein, certifies to the best of his/her knowledge and belief, that the vendor meets the definition of a "Local Business." For purposes of this section, "local business" shall mean a business which:

- a. Principle address as registered with the FL Department of State located within 30 miles of the boundaries of the city, listed with the chief licensing official as having a business tax receipt with its principle address within 30 miles of the boundaries of the city for at least one year immediately prior to the issuance of the solicitation.
 - b. Maintains a workforce of at least 50 percent of its employees from the city or within 30 miles of its boundaries.
 - c. Having paid all current license taxes and any other fees due the city at least 24 hours prior to the publication of the call for bids or request for proposals.
- Not a local vendor pursuant to Ordinance 09-22 Section 2-798
 - Qualifies as a local vendor pursuant to Ordinance 09-22 Section 2-798

If you qualify, please complete the following in support of the self-certification & submit copies of your County and City business licenses. Failure to provide the information requested will result in denial of certification as a local business.

Business Name _____ Phone: _____

Current Local Address: _____ Fax: _____
(P.O Box numbers may not be used to establish status)

Length of time at this address: _____

Signature of Authorized Representative Date: _____

STATE OF _____ COUNTY OF _____

The foregoing instrument was acknowledged before me this _____ day of _____, 20_____.

By _____, of _____
(Name of officer or agent, title of officer or agent) (Name of corporation acknowledging)

or has produced identification _____ as identification
(Type of identification)

Signature of Notary

Return Completed form with
Supporting documents to:
City of Key West Purchasing

Print, Type or Stamp Name of Notary

Title or Rank

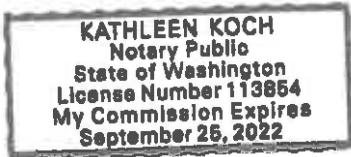


EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT

EQUAL BENEFITS FOR DOMESTIC PARTNERS AFFIDAVIT

STATE OF WASHINGTON)
 : SS
COUNTY OF KING)

I, the undersigned hereby duly sworn, depose and say that the firm of St. Moritz Security Services, Inc. provides benefits to domestic partners of its employees on the same basis as it provides benefits to employees' spouses per City of Key West Ordinance Sec. 2-799.



By: Matthew C. Schwartz
Matthew Schwartz

Sworn and subscribed before this 22nd day of May, 2021

NOTARY PUBLIC, State of Washington, at Large

My Commission Expires: 9/25/2022

Kathleen Koch, NOTARY PUBLIC



CONE OF SILENCE AFFIDAVIT

CONE OF SILENCE AFFIDAVIT

STATE OF Washington)
 : SS
COUNTY OF King)

I the undersigned hereby duly sworn depose and say that all owner(s), partners, officers, directors, employees and agents representing the firm of St. Moritz Security Services, Inc. have read and understand the limitations and procedures regarding communications concerning City of Key West issued competitive solicitations pursuant to City of Key West Ordinance Section 2-773 Cone of Silence.

By: 
Matthew Schwartz, Chief Executive Officer

Sworn and subscribed before me this

22nd day of May 2021.



NOTARY PUBLIC, State of Washington at Large

My Commission Expires: 9/25/2022

KATHLEEN KOCH
Notary Public
State of Washington
License Number 113854
My Commission Expires
September 25, 2022



ADDENDUM 1 -ACKNOWLEDGMENT



City of Key West
1300 White St.
Key West Florida, 33040

ADDENDUM NO. 1

RFP #005-21 CITY OF KEY WEST PRIVATE SECURITY SERVICES

The information contained in this Addendum adds information to be included in the Bid and is hereby made a part of the Contract Documents. The referenced bid package is hereby addended in accordance with the following items:

GENERAL NOTES:

1. Revised bid form attached.

QUESTIONS & CLARIFICATIONS:

1. Is there a living wage requirement? *No*
2. Is the Proposer required to provide a motor vehicle for any part of the contract? If so, please indicate vehicle type, location(s) and number of anticipated hours. *No*
3. Please provide the annual hours requested during the previous fiscal year. *Hours are equivalent to hours in the bid document*
4. Do you anticipate more or less hours being requested under the new contract? *Neither*
5. Is parking available for security officers at each site? *Yes*
6. Are restrooms available at each site? *Yes*
7. What equipment, if any, will be provided by the City of Key West? *None. Proposer will be required to provide a phone that works with the City's ProxiGuard Security Guard Tour System*
8. What equipment, other than flashlights, will be required by the Proposer? *Refer to bid document*
9. Are there facilities at each site where the Proposer can use for storing equipment and supplies? *Yes*
10. Does the City have an accelerated payment program for vendors? *No*
11. Who is the current incumbent? *Florida Keys Security, LLC*
12. When was the current incumbent awarded the contract? *January 2019*
13. Could you please provide us copy of current contract? *Attached*
14. Are there any subcontractors being used for the current contract? *No*
15. What was the initial term length of the current contract (for example, 1 year plus 4 year options, etc.) *3 year with 2 year options*
16. What was the start date of the initial contract? *February 2019*
17. What was the amount spent in the last 12 months? *\$229,746.04*
18. What was the total spent in the last billed month? *\$20,266.10*
19. Are there any other rates billed separately (such as equipment, vehicles, etc.) *No*



20. Are there any significant modifications from the previous contract to the new one? For instance, an increase in hours, a change in guard type (e.g., armed vs unarmed), a need for additional resources? *Cruise ship security was removed from this RFP*
21. What was the amount spent on this contract last year? *1/1/2020-12/31/2020 \$229,159.62*
22. What is the estimated total number of annual hours for this contract? *Refer to RFP*
23. What is the current bill rate for each position? *\$21.26*
24. Are there any additional services that may be needed that are not listed in the RFP? For instance, the need of additional sites, seasonal required security, etc. *Not currently*
25. Beyond the state and federal minimum wage, is there a prevailing wage, living wage ordinance, local mandated wage, or contract-specific wage? *No*
26. Is there a specific way you would like the response to be prepared? For example: bound, unbound, 3-ring binder(s), pages limits, paper type, etc.? *Refer to RFP*
27. Is the current contract using vehicles? If yes, how many? *One golf cart*
28. Will your agency hold a public opening? If yes, can you please provide with the date, time, and location? *Refer to RFP*

All other elements of the Contract and Bid documents, including the Bid Date shall remain unchanged. All Bidders shall acknowledge receipt and acceptance of this Addendum No. 1 by submitting the addendum with their proposal. Proposals submitted without acknowledgement or without this Addendum may be considered non-responsive.


Signature

St. Moritz Security Services
Name of Business



CERTIFICATE OF INSURANCE



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
2/26/2021

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 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).

PRODUCER The Mechanic Group One Blue Hill Plaza Suite 530 Pearl River NY 10965		CONTACT NAME: Amanda Duke PHONE (A/C, H/L): (845) 735-0700 FAX (A/C, H/L): (845) 735-8383 E-MAIL ADDRESS: aduke@mechanicgroup.com															
INSURED St. Moritz Security Services, Inc. 4600 Clairton Blvd Pittsburgh PA 15236		<table border="1"> <tr> <th>INSURER(S) AFFORDING COVERAGE</th> <th>NAIC #</th> </tr> <tr> <td>INSURER A: Allied World Surplus Lines</td> <td>24319</td> </tr> <tr> <td>INSURER B: Westchester Surplus Lines Insurance</td> <td>10172</td> </tr> <tr> <td>INSURER C: Indian Harbor Insurance Company</td> <td>36940</td> </tr> <tr> <td>INSURER D: Berkley Insurance Company</td> <td>32603</td> </tr> <tr> <td>INSURER E:</td> <td></td> </tr> <tr> <td>INSURER F:</td> <td></td> </tr> </table>		INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A: Allied World Surplus Lines	24319	INSURER B: Westchester Surplus Lines Insurance	10172	INSURER C: Indian Harbor Insurance Company	36940	INSURER D: Berkley Insurance Company	32603	INSURER E:		INSURER F:	
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INSURER C: Indian Harbor Insurance Company	36940																
INSURER D: Berkley Insurance Company	32603																
INSURER E:																	
INSURER F:																	

COVERAGES **CERTIFICATE NUMBER:** CL2122621909 **REVISION NUMBER:**

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

FORM LTR	TYPE OF INSURANCE	ADDITIONAL CODES (INDL/EXCL)	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> ERRORS & OMISSIONS GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC (OTHER)		8200-1082-07	3/1/2021	3/1/2022	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Per occurrence) \$ 100,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 3,000,000 PRODUCTS - COMPROP AGG \$ 3,000,000
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS					COMBINED SINGLE LIMIT (Per accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE		XSES BK - 8280058508	3/1/2021	3/1/2022	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000
B	<input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE (DES) (RETENTION \$)		LXS BK - 072809997001	3/1/2021	3/1/2022	Combined LXS and XSES \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION F (PARTIAL) ONLY	Y/N N/A				PER STATUS (OT) \$ E.L. EACH ACCIDENT \$ E.L. DISEASE - SA EMPLOYER \$ E.L. DISEASE - POLICY LIMIT \$
C	<input type="checkbox"/> COMMERCIAL CRIME <input type="checkbox"/> EMPLOYEE DISHONESTY		80CE-48000013-37	3/1/2021	3/1/2022	FORM 1 \$2,000,000

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

CERTIFICATE HOLDER * FOR PROPOSAL PURPOSES ONLY * ***** SAMPLE *****	CANCELLATION 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 Michael Lehner/AMERPS
---	---

ACORD 28 (2014/01)
INS025 (2014/01)

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THOUGHTFULLY PREPARED ON 100% Tree free, carbon neutral multipurpose paper, made from 100% sugarcane waste fiber

May 26, 2021



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
2/23/2021

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).

PRODUCER Seubert & Associates Inc. 225 North Shore Drive Suite 300 Pittsburgh PA 15212		CONTACT NAME: PHONE: 4127344800 FAX: 412-734-5725 (A/C, H/O, E/O) E-MAIL: cert@seubert.com ADDRESS:	
INSURED St Moritz Security Services, Inc. 4600 Clairton Boulevard Pittsburgh PA 15236		INSURER(S) AFFORDING COVERAGE INSURER A: Zurich American Insurance Company 16536 INSURER B: Travelers Property Casualty of America 25874 INSURER C: INSURER D: INSURER E: INSURER F:	

COVERAGES CERTIFICATE NUMBER: 1615017358 REVISION NUMBER:

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

INSTR. LTR.	TYPE OF INSURANCE	ADDITIONAL INFO (INSR. REF.)	POLICY NUMBER	POLICY EFF. DATE (MM/DD/YYYY)	POLICY EXP. DATE (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ex-occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
A	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY		BAP100944807	3/1/2021	3/1/2022	UNINSURED/UNDERINSURED SINGLE LIMIT \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DEC. X RETENTION \$ 10,000		ZUP01N0922821NF	3/1/2021	3/1/2022	EACH OCCURRENCE \$ 6,000,000 AGGREGATE \$ 8,000,000 \$
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N <input checked="" type="checkbox"/> N/A (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS:		WC100944407	3/1/2021	3/1/2022	<input checked="" type="checkbox"/> STATE STATUTE EL EACH ACCIDENT \$ 1,000,000 EL DISEASE - SA EMPLOYEE \$ 1,000,000 EL DISEASE - POLICY LIMIT \$ 1,000,000

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

CERTIFICATE HOLDER Sample 4600 Clairton Boulevard Pittsburgh PA 15236	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE <i>Kristie Zulich</i>
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LIST OF PENDING LITIGATION

There is no current or pending litigation that would materially affect the financial condition of St. Moritz or its ability to perform the services contemplated by the RFP.

Lamar Johnson v. St. Moritz Security Services, et. al.,

Illinois Circuit Court of Cook County, Case No.: 2019 L 012589

Summary: Plaintiff attacked security officer and was injured in the altercation. Plaintiff was arrested and convicted. Plaintiff filed suit for his injuries. St. Moritz denies liability.

Hunt (Tenorio) vs. Whataburger et. al., and related actions.

New Mexico, County of Santa Fe, First Judicial District, Case No.: D-101-CV-2017-02893

Summary: St. Moritz hired a subcontractor to provide security services at a Whataburger Restaurant. Tenorio instigated an altercation with the subcontracted security officer, resulting in Tenorio's death. St. Moritz denies liability.

Piazza v. Young, et al.,

U.S. District Court for the Middle District of Pennsylvania

Case No. 4:19-CV-00180

Summary: St. Moritz was hired to conduct patrols of several fraternities at Pennsylvania State University. Plaintiff's son was a fraternity pledge. He was subjected to significant hazing and physical assault by his fraternity brothers resulting in his death. St. Moritz denies liability.

