

**A G E N D A**  
**WORK SESSION AMENDED**  
**City of Moberly**  
**September 16, 2019**  
**6:00 PM**

**Requests, Ordinances, and Miscellaneous**

1. An application submitted by Lori Turk for a zoning change from an R-1 (Single Family Residential District) to an R-1/PD (Single Family/Planned District) for a proposed Medical Marijuana manufacturing facility on the property located at 1301 Union Ave.
2. Based on the traffic study, staff recommended increasing the speed limit from 25mph to 35mph on Terrill Road
3. Sugar Creek Dam Leak Mitigation Phase II – Bidding and Construction Proposal for Professional Engineering Services.
4. Replacement of the Sludge Basin Blower at the Wastewater Treatment Plant
5. A Resolution Expressing Support For Renovation Of The Moberly Jr. High Building For Use As Senior Apartments And Associated Applications To The Missouri Housing Development Commission For Low Income Housing Tax Credit; Authorizing Letters Of Support.
6. A Resolution Approving A Lease Agreement With The Timothy Zike For Property Located At 122 N Williams Street And Authorizing The City Manager To Execute The Lease.
7. Review of RFQ for consultant to research the history of Moberly for accuracy.
8. Review of RFP for historic walking tour application
9. Receipt of bids for lease purchase financing of energy performance contracting projects.

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_

WS #1.

Department: Comm. Dev.

Date: September 16, 2019

**Agenda Item:** An application submitted by Lori Turk for a zoning change from an R-1 (Single Family Residential District) to an R-1/PD (Single Family/Planned District) for a proposed Medical Marijuana manufacturing facility on the property located at 1301 Union Ave.

**Summary:** The Planning & Zoning Commission recommended approval for the request of a zoning change at the meeting on August 26, 2019. Attached is the application submitted by Lori Turk, a copy of the staff report and a copy of the re-zoning permit.

**Recommended Action:** Bring forward to the October 7, 2019 regular City Council meeting for final approval.

**Fund Name:** N/A

**Account Number:** N/A

**Available Budget \$:** N/A

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution			
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	<b>Council Member</b>		
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Kimmons</b>	___	___
<input checked="" type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed



City of *Moberly!*

*Memorandum*

*To: Planning and Zoning Commission*

*From: Planning Staff*

*Subject: AGENDA ITEM NO. 3*

*Meeting: August 26, 2019*

**Public Hearing to consider:**

Public Hearing for an application submitted by Lori Turk who is requesting the rezoning of 1301 Union Ave from an R-1 (Single-family Residential District) to an R-1 PD (Single Family Residential District- Planned Development District)

**COMMENTS:**

The parcel of land has frontage along Union Ave with a total of 41 acres. The property is bordered on the North by M-P (Mobile Park) and R-1 (Single Family Residential), on the West by R-1 and R-3 (Multifamily Residential District), on the South by R-1, and on the West with B-3 (Commercial Business District) and R-3.

The proposed plan is to develop a Medical Marijuana Infused Oils Laboratory at this location. The unused residential structure will be removed and a new structure (approx. 12,000 sq ft) will be built behind the current residential structure to conceal the view with vegetation. Driveways and entrances required hard surface concrete or paving.

Purpose of this district is to provide for elements of flexibility in design, placement, arrangements, bulk and other considerations involved in planned districts; to provide a framework within which structures and uses in the planned district may be interrelated with adjacent development areas; and to maintain the desired overall intensity of land use, desired population densities, and desired use of open space.

The Future land use map of the City comprehensive plan shows this property as single-family residential use.

A re-zoning request, when approved by Planning & Zoning Commission **will require the additional approval of the City Council.**

CITY OF MOBERLY, MISSOURI – PROCEDURES MANUAL

Article 10 – Planned Development Procedure

CITY OF MOBERLY, MISSOURI  
REZONING APPLICATION

pd 8-5-19

Return Form to:  
Community Development Director  
City of Moberly  
101 West Reed Street  
Moberly, MO 65270-1551  
(660) 263-4420  
(660) 263-9398 (fax)

For Office Use Only  
Case ID.: \_\_\_\_\_  
Date Advertised: \_\_\_\_\_  
Date Notices Sent: \_\_\_\_\_  
Public Hearing Date: \_\_\_\_\_

APPLICANT INFORMATION:

Applicant: Moberly Radiology & Imaging - Lori Turk Phone: 660 651 2719  
Address: 1301 Union Ave PO Box 188 Zip: 65270  
Owner: Lori Turk Phone: 660 651 2719  
Address: 1161 Oxbow Lane Zip: 65270

PROPERTY INFORMATION:

Street Address or General Location of Property: 1301 Union Ave  
Property is Located In (Legal Description): Parcel ID 08-9.0-31.0-0.0-000-026.000

Present Zoning R-1 Requested Zoning: ~~R-1~~ PD Acreage: 40.55

Present Use of Property: R-1

Character of the Neighborhood: undeveloped

CITY OF MOBERLY, MISSOURI – PROCEDURES MANUAL

Article 10 – Planned Development Procedure

SURROUNDING LAND USE AND ZONING:

	<u>Land Use</u>	<u>Zoning</u>
North	<u>single family / mobile park</u>	<u>R-1 / MP</u>
South	<u>undeveloped</u>	<u>R-2</u>
East	<u>Multi family - business</u>	<u>R-3 / B-3</u>
West	<u>Multi family -</u>	<u>R-3</u>

RELATIONSHIP TO EXISTING ZONING PATTERN:

1. Would the proposed change create a small, isolated district unrelated to surrounding districts? Yes  No

If yes, explain: \_\_\_\_\_

2. Are there substantial reasons why the property cannot be used in accordance with existing zoning? Yes  No

If yes, explain: Planned development is not allowed in R-1

CONFORMANCE WITH COMPREHENSIVE PLAN:

1. Is the proposed change consistent with the goals, objectives and policies set forth in the Comprehensive Plan?

Yes  No

2. Is the proposed change consistent with the Future Land Use Map?

Yes  No

TRAFFIC CONDITIONS:

1. Identify the street(s) with access to the property: Union Ave

CITY OF MOBERLY, MISSOURI – PROCEDURES MANUAL

Article 10 – Planned Development Procedure

- 2. Identify the classification of those street(s) as Arterial, Collector or Local and each Right-of-Way width:

Street Name	Classification	Right-of-Way Width
<i>Union</i>	<i>Arterial</i>	<i>60 ft.</i>

- 3. Will turning movements caused by the proposed use create an undue traffic hazard?  
Yes \_\_\_\_\_ No

IS PLATTING OR REPLATTING REQUIRED TO PROVIDE FOR:

- 1. Appropriately Sized Lots? Yes \_\_\_\_\_ No
- 2. Properly Sized Street Right-of-Way? Yes \_\_\_\_\_ No
- 3. Drainage Easements? Yes \_\_\_\_\_ No
- 4. Utility Easements:
  - Electricity? Yes \_\_\_\_\_ No
  - Gas? Yes \_\_\_\_\_ No
  - Sewers? Yes \_\_\_\_\_ No
  - Water? Yes \_\_\_\_\_ No

- 5. Additional Comments: \_\_\_\_\_

UNIQUE CHARACTERISTICS OF PROPERTY AND ADDITIONAL COMMENTS:

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

THE FOLLOWING MUST ACCOMPANY YOUR APPLICATION:

- 1. One copy of a legal description of the property proposed to be rezoned.
- 2. One copy of a statement describing the impact of the proposed change, including any traffic conditions that may result; any danger from fire hazards; how the proposed change may affect the character of the surrounding properties; and how the proposed change will benefit the City of Moberly.
- 3. A list of property owners within 185 feet of the property.

CITY OF MOBERLY, MISSOURI – PROCEDURES MANUAL

*Article 10 – Planned Development Procedure*

4. If the proposed zoning requires a conditional use permit, the rezoning application shall be accompanied by a use permit application defining the specifically requested use or list of uses.

  
Applicant's Signature

8-5-19  
Date

# Moberly, MO

WS #1.

## Property Report Card

**Parcel Number: 08-9.0-31.0-0.0-000-026.000**

Owner Name: MOBERLY RADIOLOGY & IMAGING 1 LLC

Situs Address: 1301 UNION AVE

Owner Address: 1509 UNION AVE

Owner Address 2: P O BOX 188

Owner City State Zip: MOBERLY, MO 65270

Section: 31.0

Township: 54

Range: 13

Book: 677

Page: 834

Deed Date: 9/18/2007 12:00:00 AM

Deed Acres: 41.20

Acres: 40.55

Legal Description: CARL HAYNES SURVEY...MOBERLY:

Legal Description 2: LOT 10

Legal Description 3:

Legal Description 4:

Data contained within this web site was created from record research provided by the county and/or city. Moberly, MO does not guarantee any accuracies to the data or attribute information displayed, queried, or printed from this web site. This web site is only intended for informational purposes.

The proposed change of the property located at 1301 Union Ave Moberly, MO from R-1 to M-1 will not positively impact the City of Moberly by offering the opportunity to develop land that is currently not being utilized. This prospect would potentially provide employment opportunities. It would not negatively impact the surrounding areas, as there are commercial properties in close proximity and R-3 and M-P adjoining the property. There will be minimal, if any increased traffic in the area and no danger from fire hazards.



CITY OF MOBERLY, MISSOURI  
RE-ZONING PERMIT  
REASONS FOR DETERMINATION

Submit Questions To:  
Zoning Administrator  
City of Moberly  
101 West Reed Street  
Moberly, MO 65270-1551  
(660) 263-4420  
(660) 263-9398 (fax)

For Office Use Only:

Date of Action: August 26, 2019  
Action: APPROVAL

ON AUGUST 26, 20 19, THE CITY OF MOBERLY PLANNING AND ZONING COMMISSION AT ITS REGULAR MEETING, RECOMMENDED APPROVAL (ACTION: APPROVAL, CONDITIONAL APPROVAL, DENIAL) OF A RE-ZONING REQUEST FROM A(N) R-1 TO A (N) R-1/PD (ZONE) TO BE LOCATED AT 1301 UNION AVENUE, MOBERLY, MISSOURI. (ADDRESS OR LOCATION).

THE CITY COUNCIL WILL CONSIDER THE RECOMMENDATION OF THE PLANNING AND ZONING COMMISSION AT THE SEPTEMBER 3, 20 19 MEETING OF THE MOBERLY CITY COUNCIL.

IN RECOMMENDING APPROVAL (ACTION) OF THIS RE-ZONING REQUEST, THE PLANNING AND ZONING COMMISSION CONSIDERED ALL STANDARDS LISTED IN THE ZONING REGULATION, AND ALL OTHER CONDITIONS LISTED FOR THAT USE IN OTHER SECTIONS OF THESE REGULATIONS. IN ADDITION, THE PLANNING AND ZONING COMMISSION FOUND THAT THE PROPOSED USE DID (DID/DID NOT) PROVIDE SAFEGUARDS TO ASSURE ITS COMPATIBILITY WITH THE SURROUNDING AREA.

CONDITIONS (IF ANY): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Connie Asbury  
CHAIRPERSON CONNIE ASBURY

Shawn Andrews  
ZONING ADMINISTRATOR



# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_  
 Department: Public Works  
 Date: September 16, 2019

WS #2.

**Agenda Item:** Establishing a speed limit for Terrill Road.

**Summary:** Based on the traffic study, staff recommended increasing the speed limit from 25mph to 35mph.

**Recommended Action:** Direct staff to bring forward to the October 7, 2019 regular City Council meeting for final approval.

**Fund Name:** N/A

**Account Number:** N/A

**Available Budget \$:** N/A

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input checked="" type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution	<b>Council Member</b>		
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice			
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed

**BILL NO:** \_\_\_\_\_

**ORDINANCE NO:** \_\_\_\_\_

**AN ORDINANCE ESTABLISHING THE SPEED LIMIT FOR TERRILL ROAD.**

**Whereas,** Section 304.120 RSMo., provides that municipalities may, by ordinance, establish speed regulations within the limits of the municipality; and

**Whereas,** Section 40-276 of the Moberly City Code provides that the rate of speed for motor vehicles in the city is 25 miles per hour unless otherwise provided; and

**Whereas,** the Moberly city staff are recommending that a 35 miles per hour speed limit be established for Terrill Road as it runs from the west city limits to the east city limits.

**NOW, THEREFORE, BE IT ORDAINED BY THE CITY COUNCIL OF THE CITY OF MOBERLY, MISSOURI TO WIT:**

**SECTION ONE:** Pursuant to Section 20-276 of the Moberly City Code the speed limit for Terrill Road as it runs from the west city limits to the east city limits is set at 35 miles per hour.

**SECTION TWO:** The table of speed limits provided in Section 20-276 of the City Code is hereby amended to so provide.

**SECTION THREE:** This ordinance shall take immediate effect upon passage by the city council.

**PASSED AND ADOPTED** by the Council of the City of Moberly, Missouri, this 7<sup>TH</sup> day of October, 2019.

\_\_\_\_\_  
Presiding Officer at Meeting

**ATTEST:**

\_\_\_\_\_  
City Clerk

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_ WS #3.

Department: Public Utilities

Date: September 16, 2019

**Agenda Item:** Sugar Creek Dam Leak Mitigation Phase II – Bidding and Construction Proposal for Professional Engineering Services.

**Summary:** The sugar Creek Dam has experienced seepage through the west abutment for over 37 years. A grouting program in 1980 reduced leakage rates from around 225 gallons per minute down to less than 20 gallons per minute. Since that time, the seepage rate has progressively increased. This phase will consist of bidding and construction services for the project designed in Phase I.

**Recommended**

**Action:** Direct Staff to bring forward to the regular session on October 7th, 2019.

**Fund Name:** Design Engineering

**Account Number:** 304.000.5408

**Available Budget \$:** 1,595,000

ATTACHMENTS:		Roll Call	Aye	Nay
___ Memo	___ Council Minutes	<b>Mayor</b>		
___ Staff Report	___ Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
___ Correspondence	___ Proposed Resolution			
___ Bid Tabulation	___ Attorney's Report	<b>Council Member</b>		
___ P/C Recommendation	___ Petition	M___ S___ <b>Brubaker</b>	___	___
___ P/C Minutes	___ Contract	M___ S___ <b>Kimmons</b>	___	___
___ Application	___ Budget Amendment	M___ S___ <b>Davis</b>	___	___
___ Citizen	___ Legal Notice	M___ S___ <b>Kyser</b>	___	___
___ Consultant Report	___ Other _____		Passed	Failed



One Financial Plaza  
 501 North Broadway  
 St. Louis, Missouri 63102  
 United States  
 T +1.314.335.4000  
 www.jacobs.com

September 6, 2019

Mary West-Calcagno  
 Director of Utilities  
 City of Moberly  
 101 West Reed Street  
 Moberly, MO 65270

**Subject: Sugar Creek Dam Leak Mitigation Phase II – Bidding and Construction Proposal for Professional Engineering Services**

Dear Mary:

Jacobs Engineering Group, Inc. (Jacobs) is pleased to present our proposal to provide the City of Moberly (City) with Professional Engineering Services for a grouting program to mitigate the leakage at the Sugar Creek Lake Dam. Sugar Creek Lake is the drinking water source for the City of Moberly, and the City is currently undertaking steps to evaluate the quantity and quality of the water that the Lake can provide the City and its customers now and in the future. The Sugar Creek Dam has experienced seepage through the west abutment for over 37 years. A grouting program in 1980 reduced leakage rates from around 225 gallons per minute (gpm) down to less than 20 gpm. Since that time, the seepage rate has progressively increased. This phase will consist of bidding and construction services for the project designed in Phase I.

## SCOPE

**Bid Phase Services.** Jacobs will provide the following bidding phase services:

- A. Conduct a pre-bid meeting at the Sugar Creek Dam.
- B. Coordinate distribution of plans and specifications to prospective bidders and manage the plan holder's list.
- C. Prepare and distribute any necessary addendums.
- D. Assist the City in responding to questions from potential bidders during the Bid period and prepare addenda, as required.
- E. Attend the bid opening remotely via conference call. Review the bids and provide the City with a recommendation for award.

**Construction Phase Services.** Jacobs will provide Construction Phase Services, as described in the tasks below.

- A. Pre-Construction Meeting. Jacobs will attend a pre-construction meeting with the City and the contractor selected for the project.
- B. Shop drawing review for submittals during the construction period. Review detailed construction drawings and shop drawings, samples and other information submitted by Contractors, for conformance with the design concept and the concept of the information given in the Contract Documents. Such data will be recommended for approval, returned for revision or rejected. Such review and recommendation shall not extend to means,



September 6, 2019

methods, sequences, techniques or procedures of construction, or to safety precautions and programs incident thereto as such are the responsibility of the Construction Contractor.

- C. Respond to the contractor's RFIs (Request for Information).
- D. Jacobs will provide full-time Resident Project Representative (RPR) services during the construction. The RPR will observe the progress and quality of the construction work to determine in general if the work is proceeding according to the Contract Documents. Jacobs will consult with City representatives; and maintain contact by telephone and correspondence during the course of the project.
- E. While on site, the RPR is responsible for seeing that the project is constructed in accordance with the drawings and specifications. However, Jacobs shall not be responsible for the failure of the Contractor(s) to perform the work in accordance with the Contract Document or the daily quality of Contractor's work. Jacobs will not bear any responsibility or liability for defects or deficiencies in the work or for the failure to so detect. The RPR shall provide observation of the Contractor, provide field administration on the work site, and act as the focal point for communication and correspondence with the Contractor at the field level. The RPR shall:
  - 1. Provide on-site administration and surveillance, as outlined herein, of the construction activities on the Project.
  - 2. If the Contractor has not corrected unsatisfactory work after request of the RPR, advise City of work that remains unsatisfactory, faulty or defective or does not conform to the Contract Documents.
  - 3. Receive Contractor's suggestions for modifications in drawings or specifications and report them, with comments, to the City.
  - 4. While on site, keep a diary or log book, in ink, recording hours on the job site, weather conditions, labor and equipment employed on the job, the location and nature of work being performed, the progress of the work, instructions given, accidents, data relative to questions of extras or deductions, list of visiting officials and representatives of manufacturers, fabricators, suppliers and distributors, daily activities, decisions, observations in general and specific observations in more detail as in the case of observing test procedures.
  - 5. Advise the City, in advance, of scheduled, major tests, inspections or start of important phases of the work.
- F. At a time near substantial completion of the work, prepare and submit to the Contractor a "punchlist" of items which require correction or completion.
- G. Receive and record information as it is submitted by the Contractor regarding changes from the contract drawings made during progress of the work. Incorporate such changes on a set of contract plans to be used in preparing record drawings of the project.
- H. Except upon written instructions of City, the RPR SHALL NOT:
  - 1. Authorize any deviation from the Contract Documents or approve any substitution of materials or equipment.
  - 2. Neither advise nor issue directions relative to any aspect of the means, methods, techniques, sequences or procedures of construction unless such is specifically called for in the Contract Documents.





September 6, 2019

- 3. Neither advise nor issue directions as to safety precautions and programs in connection with the work. However, if on site, Jacobs will report immediately to City upon the occurrence of any accident. Record and obtain all possible information concerning circumstances, weather, unsafe conditions, etc. Obtain pictures, if available, for the project records. This information shall be forwarded immediately to City.
- 4. Authorize occupancy, acceptance or conditional acceptance.
- 5. Participate in specialized field or laboratory tests, except as specifically authorized to do so by the Contract Documents.
- 6. Direct a Contractor to do work at a specific time or in a certain way unless it is an emergency that would otherwise endanger life or property.

**Record Drawings and Certification of Construction Complete.** Jacobs will provide record drawings for the project based on information provided by the contractor and recorded during construction. Jacobs will also certify construction complete and in accordance with MDNR approved plans and specifications as required by MDNR.

**FEE PROPOSAL**

Our proposed fee for the work described herein is not to exceed a cost of \$78,200. This fee includes only those services outlined in our proposal. Additional services can be provided if requested by the City.

**SCHEDULE**

Schedule is dependent on obtaining a construction permit and lake levels.

**ADDITIONAL CONTRACTUAL HOURLY RATES**

The following hourly rates are updated from Appendix B, JACOBS Standard Contract Provisions, Terms of Payment – Hourly Rate Basis, under A. SALARY COSTS, OVERHEAD & PROFIT. These rates are valid through the end of calendar year 2020.

Description	Rate
Project Manager	\$120.00
Geotechnical Engineer VI	\$160.00
Geotechnical Engineer V	\$130.00
Geotechnical Engineer IV	\$105.00
RPR	\$90.00
CADD Designer	\$100.00



September 6, 2019

**ASSUMPTIONS / CLARIFICATIONS:**

This proposal is based on the following assumptions and clarifications:

1. Pre-Bid Meeting and Pre-Construction Meeting will be attended in person, but we will only participate in the bid opening via conference call.
2. Two full size sets of the Issued for Bid plans and specifications will be provided to the City and MDNR (construction permit).
3. Jacobs will provide distribution of the plans and specifications to prospective bidders. Cost for reproduction and shipping of plans and specifications to prospective bidders is not included in the not to exceed cost and will be charged to the prospective bidder.
4. RPR services for this project are based on an estimated construction period of 30 days and 8 hours per day (240 hours total).
5. Should the construction scope require a longer duration in the field, additional funds may be required.

This work will be performed as a modification to our existing contract with the City of Moberly, dated January 3, 2001. We will endeavor to be as efficient as we can in performing the work, to minimize costs.

If you are in agreement, please sign both copies of this letter and return one copy to us at your convenience.

Very truly yours,

Jacobs Engineering Group, Inc.

Tobin Lichti, P.E.  
Project Manager

Authorization to Proceed:

**City of Moberly**

By \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

**Jacobs Engineering Group, Inc.**

By \_\_\_\_\_

Title \_\_\_\_\_

Date \_\_\_\_\_

# City of Moberly City Council Agenda Summary

Agenda Number: WS #4.

Department: Public Utilities

Date: September 16, 2019

**Agenda Item:** Replacement of the Sludge Basin Blower at the Wastewater Treatment Plant

**Summary:** On August 10, 2019, a blower for the sludge holding tank at the Wastewater Treatment Plant caught fire and burned completely. There are two blowers for this facility; the other blower was de-energized until it could be checked for defects to avoid a similar catastrophic event. Upon examination, it was determined that the blower portion of the second unit also needed extensive repairs, and a remanufactured unit was ordered and installed on August 19 and 20, 2019. A quote for a replacement unit was received from Hydrokinetics, Inc. including the enclosure and all equipment inside for \$51,600, not including installation costs. Hydrokinetics is the sole source distributor for this equipment in our area. The lead time for this unit is approximately 12-16 weeks. We are currently running on 1 blower until the second unit can be received and installed. This equipment is essential to our operation and required for redundancy.

The utilities replacement fund is a reserve fund utilized to pay for unexpected expenses to replace or repair large expense items that are not budgeted. The fund balance in this account is sufficient to cover this expense. Normally, this line item is not budgeted for anticipated replacements.

**Recommended**

**Action:** Authorize the purchase of the blower through Hydrokinetics, LLC.

**Fund Name:** Utilities Replacement Fund

**Account Number:** 302.000.5311

**Available Budget \$:** 0

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution			
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	<b>Council Member</b>		
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed





**AERZEN**

Compressed air, gas  
and vacuum solutions

Aerzen USA  
108 Independence Way  
Coatesville, PA 19320 USA

Telephone: (610) 380-0244  
Fax: (610) 380-0278  
inquiries@aerzenusa.com  
www.aerzenusa.com

**City of Moberly, Missouri**

300 N Clark Street

Moberly, MO 65270

Attention: Ben Riles, [briles@cityofmoberly.com](mailto:briles@cityofmoberly.com)

**RE:** ACKNOWLEDGEMENT of Purchase Order #08152019  
Project: GM 60S Replacement Blower

September 6, 2019

Dear Mr. Riles:

Thank you for the above-referenced purchase order.

**PROJECT CONTACTS:**

Project Manager:	Jill Gouert	<a href="mailto:jill.gouert@aerzen.com">jill.gouert@aerzen.com</a>	484-718-3711
Contracts:	Amy Goldberg	<a href="mailto:amy.goldberg@aerzen.com">amy.goldberg@aerzen.com</a>	484-718-3816
Sales:	Doug Cagney	<a href="mailto:doug.cagney@aerzen.com">doug.cagney@aerzen.com</a>	484-678-6811
Service Coordinator:	Silke Melvin-Enz	<a href="mailto:silke.melvin-enz@aerzen.com">silke.melvin-enz@aerzen.com</a>	484-718-3602

- ❖ PLEASE CONTACT THE SERVICE SCHEDULE COORDINATOR, SILKE MELVIN-ENZ (484-718-3602), IN THE AFTER SALES DEPARTMENT, THREE TO FIVE WEEKS PRIOR TO THE EQUIPMENT START-UP DATE TO SCHEDULE SERVICE. SERVICE BEYOND WHAT IS ITEMIZED IN THE QUOTE FOR STARTUP AND TRAINING WILL BE AT AN ADDITIONAL COST.
- ❖ **The following statement shall apply to any and all terms and conditions of the above-referenced Purchase Order:**
  - Please note that any exceptions to the Technical Terms and Conditions will be sent in the submittal. The equipment and/or work as described in the Purchase Order shall be inclusive of all the technical exceptions as approved by the Owner and/or Owner's representative in the Submittal Process.
- ❖ **Payment Terms:**
  - 95% upon shipment of equipment, NET 30.
  - 5% upon start-up NET 30, not to exceed 180 days from shipment.
- ❖ Attached hereto and incorporated by reference herein, please find Aerzen USA Corp.'s Warranty and TERMS AND CONDITIONS OF SALE – New Equipment Packages.

**AERZEN USA CORPORATION**

108 Independence Way  
 Coatesville, PA 19320  
 Tel. (610) 380-0244 ♦ Fax. (610) 380-0278



**AERZEN**

**Confidential & Proprietary - this document shall not be distributed to anyone other than the intended recipients.**

**AERZEN** Reference Number: E28-38274

12-Aug-19

Re: Moberly MO Replacement Blower

Page 1 of 2

<p><b>To:</b> Ben Riles                  Firm - City of Moberly MO                  email - briles@cityofmoberly.com                  phone - 660-269-9437</p>
<p><b>AERZEN</b> Representative Info:                  Name - Jeff Clarke of Hydro-Kinetics Corporation                  e-mail - jclarke@hydro-kinetics.com                  phone - (314) 306-7977</p>

<p><b>AERZEN</b> Proposal Prepared By:                  Name - Doug Cagney                  email - doug.cagney@aerzen.com                  phone - (484) 678-6811</p>
<p><b>AERZEN</b> Regional Manager:                  Name - Doug Cagney                  e-mail - doug.cagney@aerzen.com                  phone - (484) 678-6811</p>

**This scope of supply does NOT include the following items: MCC starter, VFD, External Controls, Isolation Valves and Installation Hardware.**

**GM 60S Replacment Blower**

**Model: GM 60S**

**Performance Data:**

**Design**

Intake volume, handled at intake condition	icfm	2,074
Volume handled at normal condition	scfm	1,815
Relative humidity	Φ	80%
Intake pressure (abs.)	psia	14.30
Pressure difference	psig	7.00
Intake temperature	°F	100
Discharge temperature	°F	189
Main rotor speed	rpm	3,000
% of maximum	%	100%
Motor Speed	rpm	1,775
Power consumption at coupling	bHp	85.8
Motor Rating	HP	<b>100</b>
Blower max rotor speed	rpm	3,000
Tolerance on flow & power	± 5 %	
Sound pressure level w/o enclosure	dB(A)	98
Sound pressure level w/ enclosure	dB(A)	76
measured in free field at 3ft. distance from the outline of the unit (tol. ± 2 dB(A)).		

**Weights & Dimensions:**

Discharge connection	CS ANSI	8"
Blower pkg weight	lbs.	4,387
Envelope dim.*	LxWxH in.	81 x 67 x 83
Cooling Fan	shaft driven	shaft driven

\* non binding dimensions includes, inlet filter silencer, relief valve, check valve, and flex connector


**AERZEN**

 Compressed air, gas  
and vacuum solutions

 Aerzen USA  
108 Independence Way  
Coatesville, PA 19320 USA

 Telephone: (610) 380-0244  
Fax: (610) 380-0278  
inquiries@aerzenusa.com  
www.aerzenusa.com

**CITY OF MOBERLY, MISSOURI  
PO #081520129  
GM 60S REPLACEMENT BLOWER**

**LIMITED WARRANTY**

Unless otherwise stated in Seller's quotation, Seller warrants the products and parts that it manufactures will be free from defect in materials and workmanship for twenty-four (24) months from the date of start-up, but not to exceed thirty (30) months from the date of readiness to ship. Performance warranties (if any) are limited to those specifically included in Seller's proposal and identified as such. Equipment (including accessories, components and parts thereof) furnished by Seller but manufactured by others is not warranted by Seller and such equipment shall carry the warranty (if any) which the manufacture has conveyed to Seller to the extent it can be passed on to the Buyer. Seller shall, upon prompt written notice by the Buyer, correct such non-conformities, at Seller's option, by either repair or replacement. All such defective Goods shall be sent at Buyer's expense directly to Seller at 108 Independence Way, Coatesville, PA, USA, 19320. Shipment of repaired or replacement goods will be at Seller's expense. Seller warrants any Equipment repaired or replaced pursuant to the above warranty to be free from defects in materials and workmanship for the longer of: (a) a period of ninety (90) days after the start-up of such repaired or replaced Equipment or (b) the period remaining on the Equipment warranty.

THE FOREGOING WARRANTIES ARE EXCLUSIVE AND IN LIEU OF ALL OTHER WARRANTIES, WHETHER WRITTEN, ORAL OR IMPLIED, INCLUDING ANY WARRANTY OF PERFORMANCE, MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. NO REPRESENTATION, CONDITION OR WARRANTY, INCLUDING, BUT NOT LIMITED TO, STATEMENTS OF CAPACITY, SUITABILITY FOR USE, OR PERFORMANCE, WHETHER MADE BY SELLER, EMPLOYEES OR REPRESENTATIVE PERSONNEL, SHALL BE CONSIDERED TO BE A WARRANTY BY SELLER FOR ANY PURPOSE OR GIVE RISE TO ANY LIABILITY OF SELLER WHATSOEVER AND ALL SUCH IMPLIED WARRANTIES ARE HEREBY DISCLAIMED BY SELLER AND EXCLUDED FROM ANY CONTRACT RESULTING OR ARISING FROM OR OTHERWISE EVIDENCED BY THIS AGREEMENT.

The above warranties do not apply to products which are (a) repaired, modified or altered by any party other than Seller or Seller's Authorized Service Center; (b) subjected to unusual physical, thermal, or electrical stresses, corrosion or erosion, improper installation or maintenance, lack of lubrication, misuse, abuse, accident or negligence in use, improper storage, transportation or handling, or (c) considered a consumable item or an item requiring repair or replacement due to normal wear and tear. SELLER SHALL NOT BE LIABLE FOR SPECIAL OR CONSEQUENTIAL DAMAGES WHICH MAY ARISE UNDER THIS CONTRACT, AND IN NO CASE SHALL SELLER'S LIABILITY EXCEED THE VALUE OF THE PURCHASE ORDER.





the Seller reserves the right to change all specifications without prior notification or public announcement. Nothing in the Condition shall oblige the Buyer to accept Goods which do not reasonably comply with the purchase order.

## 6. LIABILITY

Seller's liability with respect to the Goods sold hereunder shall be limited to the warranty provided in Section 10 of these Terms and Conditions and shall be limited to the contract price. In no event shall Seller be liable for special, indirect, incidental, consequential or punitive damages, or expenses incurred by Buyer, Buyer's customers or any third party, whether arising from breach of contract, warranty, negligence, strict liability in tort or other theories of law or equity, including, but not limited to, loss of profits or revenue, loss of use, cost of capital, cost of substitutes, downtime, service interruption, or any other type of economic loss.

## 7. SHIPPING DATE

Shipping dates are estimates and not a guarantee of a particular day of shipment. Seller shall not be liable in any way for any default or delay in shipping due to contingencies beyond its control which prevent or interfere with Seller making delivery on the date specified, including, but not limited to, war, restraints affecting shipping, delivery of materials or credit as a result of war or war restrictions, non-arrival, delay or failure to procure materials as a result of war or war restrictions, rationing of fuel, strikes, lockouts, fires, bombings, terrorism, accidents, floods, droughts and any other contingency affecting Seller, its suppliers, or subcontractors; and Seller shall have the right to cancel a contract of sale or to extend the shipping date in the event that one or more of such contingencies prevents or delays shipment.

## 8. DELIVERY

a. **Title and Risk of Loss:** All products will be delivered FCA Aerzen, Coatesville, PA unless otherwise agreed by both parties in writing. In no event shall Seller be liable for any delay in delivery or assume any liability in connection with shipment, nor shall the carrier be deemed an agent of Seller.

b. **Acceptance of Products:** Buyer shall inspect all products promptly upon receipt. All claims by Buyer, except only those provided for under Warranty clauses, must be asserted in writing by Buyer within a 5-day period from receipt or they are waived.

c. **Delays by Buyer:** In the event that Goods cannot be shipped to Buyer when ready due to any cause not attributable to Seller, upon notice to Buyer, Seller may ship such Goods to storage. If such Goods are placed in storage, including storage at the facility where manufactured, the following conditions shall apply: (i) all risk of loss or damage shall thereupon pass to Buyer; (ii) any amounts otherwise payable to Seller upon delivery shall be payable upon presentation of Seller's invoice; (iii) the Goods shall be deemed as shipped and the warranty time period shall commence; (iv) all expenses incurred by Seller, such as preparation for and placement into storage, handling, inspection, preservation, insurance, storage and removal charges and any taxes shall be payable by Buyer; and (v) when conditions permit and upon payment of all amounts due hereunder, Seller shall resume delivery of Goods to the originally agreed point of delivery.

d. **Partial Shipment:** Partial shipment of an order will not be made without Buyer's knowledge or consent. In the event a complete shipment cannot be made by the required date, Buyer will be notified and asked whether entire shipment shall be held or partial shipment made. If partial shipment with Buyer's approval is made, excess freight charges, if any, will be billed to the Buyer.

## 9. CANCELLATION, POSTPONEMENT OR CHANGE ORDERS

Orders are not subject to Buyer's cancellation, postponement or change in specifications, shipping schedules or other conditions originally agreed upon without Seller's written consent and then only upon agreement to compensate Seller for any or all losses caused by such cancellation, postponement or changes.



CONTRACT, TORT (INCLUDING NEGLIGENCE) OR OTHERWISE, AND IN NO CASE SHALL SELLER'S LIABILITY EXCEED THE PRICE OF THE GOODS.

#### **11. NONCONFORMING GOODS**

Any rejection of nonconforming Goods must be made by the Buyer within five (5) days of delivery and Buyer must give written notice to Seller within that period. Such notice shall contain a brief description of the alleged non-conformity. Upon receipt of such notification, Seller will immediately arrange for the return of the Goods, at Seller's expense, and upon confirmation of the nonconformity, Seller, at Seller's expense, will ship conforming Goods to Buyer.

#### **12. RETURNS AND REPAIRS**

When Goods are returned for repair, the Buyer must contact Seller's customer support department for shipping instructions and a return material authorization (RMA#). Buyer must ship back product in original packaging or equivalent, with the RMA # clearly marked on the outside of the package, freight prepaid. Seller shall not be responsible for any damage occurring in transit or obligated to accept products returned without RMA #. Buyer bears all risk of loss or damage to the returned product until delivery at Seller's designated facility. Any return shipment received by Seller without a RMA # and/ or whose contents are not received in their original condition, may be reshipped by Seller freight collect to Buyer.

#### **13. RETURNS FOR CREDIT**

No returns for credit will be accepted unless Seller's permission has been obtained in each case in advance. Only sizes and designs taken from Seller's regular line, which are in active demand, can be accepted for credit. Credit will be based on prices prevailing at the time of return, or invoiced price, whichever is lower, subject to deduction for handling costs and additional deduction for expenses incurred in restoring Goods to saleable condition. Obsolete or specially manufactured Goods can be accepted for return or credit only the extent of their value to seller in each case. No credit will be issued to other than the original Buyer.

#### **14. APPLICABLE LAWS**

This Agreement and the respective rights and obligations of the Buyer and Seller with regard hereto shall be governed by and construed according to the laws of the Commonwealth of Pennsylvania, without regard to the principles of conflicts of law thereof.

#### **15. NOTICE**

Any and all notices or other communications or deliveries required or permitted to be provided hereunder shall be in writing and shall be sent to Aerzen USA, 108 Independence Way, Coatesville, PA, 19320 or faxed to (610) 380-0278, Attn: Sales Manager.

#### **16. ASSIGNMENT**

Neither party may assign or transfer this Agreement without the prior written consent of the other party.

#### **17. CONFIDENTIAL INFORMATION**

Any design specifications, manufacturing drawings, technical data or other information or materials submitted to Buyer and identified by Seller as confidential are and shall remain the exclusive property of Seller. Buyer agrees to treat such information as confidential and shall not reproduce or disclose such information without the express prior written consent of Seller.

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_ WS #5.

Department: City Manager

Date: September 16, 2019

**Agenda Item:** A Resolution Expressing Support For Renovation Of The Moberly Jr. High Building For Use As Senior Apartments And Associated Applications To The Missouri Housing Development Commission For Low Income Housing Tax Credit; Authorizing Letters Of Support.

**Summary:** Recently, Horizon Housing Foundation was given the property commonly known as the Moberly Junior High by the previous owner. They are working with ND Consulting to work with the Missouri Housing Development Corporation at applying for low-income housing tax credits for senior housing for the Moberly Junior High project. These tax credits are very competitive and support of the community is one of the biggest factors in receiving funding. Similar projects for this property have been proposed in the past, but this proposal has a few distinctions. The project will be dedicated to senior housing with income restrictions. All tenants will have to pay rent to live in the apartments, and the amount of apartments being proposed is far less than previous submittals. Furthermore, the consultations group and owners of the property have extensive knowledge, history and success with housing tax credit programs through MHDC. ND Consulting is requesting support for their application and is requesting a resolution of support and letters of support from citizens and organizations in the community for this proposal.

**Recommended**

**Action:** Direct staff to bring to the October 7<sup>th</sup> Council meeting for final approval

**Fund Name:**

**Account Number:**

**Available Budget \$:**

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input type="checkbox"/> Correspondence	<input checked="" type="checkbox"/> Proposed Resolution	<b>Council Member</b>		
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice		___	___
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed

**RESOLUTION NO. \_\_\_\_\_**

**A RESOLUTION EXPRESSING SUPPORT FOR RENOVATION OF THE MOBERLY JR. HIGH BUILDING FOR USE AS SENIOR APARTMENTS AND ASSOCIATED APPLICATIONS TO THE MISSOURI HOUSING DEVELOPMENT COMMISSION FOR LOW INCOME HOUSING TAX CREDIT; AUTHORIZING LETTERS OF SUPPORT.**

*WHEREAS*, the City Council deems it in the public interest and general welfare of the City that affordable rental housing that is accessible, energy efficient, healthy, safe and well-maintained be made available to the residents of the City of Moberly; and

*WHEREAS*, ND Consulting Group & the Horizon Housing Foundation will submit to the Missouri Housing Development Commission an application for consideration of award of Low Income Housing Tax Credits necessary to finance the renovation of the Tannehill Apartments;

**NOW, THEREFORE, BE IT RESOLVED BY THE COUNCIL OF THE CITY OF MOBERLY, MISSOURI, AS FOLLOWS, TO-WIT:**

**SECTION ONE:** The City of Moberly hereby supports the application made by ND Consulting Group & the Horizon Housing Foundation, Missouri to the Missouri Housing Development Commission for Low Income Housing Tax Credits for renovation of forty-eight (48) public housing units for seniors to be known as Tannehill Apartments.

**SECTION TWO:** This Resolution shall be in full force and effect from and after its passage and adoption as provided by law. The City Council hereby authorizes Mayor Jerry Jeffrey to provide letters of support to ND Consulting Group & Horizon Housing Foundation for the renovation of the Moberly Jr. High for use as Tannehill Apartments, a 48 One & Two bedroom Unit Project.

**PASSED AND ADOPTED** by the Council of the City of Moberly, Missouri, this \_\_\_\_\_ day of \_\_\_\_\_, 2019

\_\_\_\_\_  
Presiding Officer at Meeting

**Attest:**

\_\_\_\_\_  
D. K. Galloway, City Clerk

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_  
 Department: City Manager  
 Date: September 16, 2019

WS #6.

**Agenda Item:** A Resolution Approving A Lease Agreement With The Timothy Zike For Property Located At 122 N Williams Street And Authorizing The City Manager To Execute The Lease.

**Summary:** The city recently acquired a building Williams and Reed Street which had existing lessees. There is one retail space still available which Mr. Tim Zike has expressed interest in renting. The proposed lease has an initial term of 6 months for \$500.00 per month and then continues on a month-to-month basis thereafter. Mr. Zike has a memorabilia business which he currently operates outside of the city limits.

**Recommended Action:** Forward the Resolution and Lease for approval on the Regular Agenda for October 7, 2019.

**Fund Name:** N/A

**Account Number:** N/A

**Available Budget \$:** N/A

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input type="checkbox"/> Correspondence	<input checked="" type="checkbox"/> Proposed Resolution	<b>Council Member</b>		
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> P/C Minutes	<input checked="" type="checkbox"/> Contract	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice			
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed



**BILL NO:** \_\_\_\_\_

**RESOLUTION NO:** \_\_\_\_\_

**A RESOLUTION APPROVING A LEASE AGREEMENT WITH THE TIMOTHY ZIKE FOR PROPERTY LOCATED AT 122 N WILLIAMS STREET AND AUTHORIZING THE CITY MANAGER TO EXECUTE THE LEASE.**

**WHEREAS,** Timothy Zike is desirous of renting retail office space from the city at 122 N Williams Street for a memorabilia/collectables business; and

**WHEREAS,** it is desirable to the city to have tenants using retail business space in the downtown Moberly; and

**WHEREAS,** the lease agreement attached hereto provides for an initial six-month term with successive one month renewals which can be terminated or renewed by either party and sets forth the rights and liabilities of the parties.

**NOW, THEREFORE,** the lease agreement with Timothy Zike is hereby approved and the City Manager is hereby authorized to execute the Agreement on behalf of the City of Moberly, Missouri.

**RESOLVED** this 7th day of October, 2019, by the Council of the City of Moberly, Missouri.

\_\_\_\_\_  
Presiding Officer at Meeting

**ATTEST:**

\_\_\_\_\_  
City Clerk

OFFICE LEASE  
CITY OF MOBERLY, MISSOURI  
122 NORTH WILLIAMS STREET

THIS LEASE is made this \_\_\_ day of \_\_\_\_\_, 2019, between the City of Moberly, Missouri, (hereinafter "City") a municipal corporation and Timothy Zike (hereinafter "Lessee").

**RECITALS**

- A. City is a Third-Class statutory city duly organized and validly existing under the laws of the state of Missouri with the power to conduct municipal business pursuant to Missouri law and the Ordinances duly enacted by the Moberly City Council.
- B. City is the owner of various downtown retail buildings which are available to local businesses to rent.
- C. City leases office space in a building at 122 N. Williams and desires to lease said space to Lessee.
- D. Lessee is desirous of operating a memorabilia/collectables retail business at said location.

**AGREEMENT**

**SECTION 1. RECITALS**

The above stated Recitals are true and correct and are incorporated herein and made a part of this Lease agreement (hereinafter "Agreement").

**SECTION 2. PREMISES**

City hereby leases to Lessee, and Lessee hereby leases from City, the office space including a bathroom located at 122 N. Williams Street, Moberly, Missouri 65270 (hereinafter the "Premises"). Lessee accepts the Premises "As Is," subject to all applicable municipal, state and federal laws, ordinances, regulations and policies governing and regulating the use of the Premises, and any covenants or restrictions of record. Lessee acknowledges that City has made no representations or warranties as to the physical state of the Premises, or any suitability of the Premises.

2.1 Non-Exclusive Use. The building which includes 122 N. Williams has other retail lessees who operate businesses in Moberly, MO.

2.2 Waiver. Lessee hereby waives any claims for damages for any injury or inconvenience or interference with Lessee's use and occupancy of the Premises, any loss of occupancy or quiet enjoyment of the Premises or any other loss occasioned by City's exercise of its rights under this Agreement or by the City's actions taken for management and protection of the City's property resources and visitors.

2.3 Ownership of Premises. This Agreement does not vest in Lessee any fee interest in the Premises. Title to the Premises at all times is with and shall remain solely with City.

### **SECTION 3. TERM**

3.1 Six Months. The initial term of this lease shall be for six months beginning on October 1, 2019 and ending on March 31, 2020.

3.2 Renewal. This lease shall renew on a month-to-month basis following the end of the initial six-month term until terminated by either party. Termination shall be in writing and delivered thirty (30) days prior to the termination date. Renewals shall be on the same terms and conditions stated herein unless amended in writing prior to the start date of the renewal term.

3.3 Abandonment. Lessee shall occupy the Premises during the entire Lease Term, as described herein. If it fails to do so, Lessee may be determined as in default for abandoning the Premises.

### **SECTION 4. RENTAL AMOUNT**

4.1 Monthly. Lessee shall pay Five Hundred Dollars (\$500.00) per month during the term of this lease. Payment is due no later than the first business day of each month. Lessee may prepay any amount at any time.

### **SECTION 5. LESSEE'S PERMITTED USE AND ACTIVITY**

5.1 Use. Lessee may utilize the Premises only for the purposes necessary to conduct its usual business operations. Lessee intends to operate a retail memorabilia/collectables business on the premises. Lessee shall obtain a city business license prior to beginning business operations on the premises.

5.2 Access and Key. Lessee shall be issued a key and security code and permitted free access for ingress and egress one day each week. Lessee shall be charged \$20 to replace a door key.

5.3 Alterations. Lessee shall not make any alterations of any nature to the Premises without the written permission of the City.

### **SECTION 6. CITY'S OBLIGATIONS**

6.1 City Inspection. City shall, at all reasonable times, have the full and unrestricted right to enter the Premises for the purpose of inspecting the leased area, for maintenance and to determine compliance with the terms of this Agreement.

6.2 Maintenance. City agrees to maintain the leased Premises in the same condition as when leased, ordinary wear and tear excepted, during the term of this Agreement.

6.3 Trash Disposal. City agrees to pay for trash service at the leased premises.

6.4 Utilities. City shall provide all utilities necessary for the business operations of the Lessee except Lessee shall provide internet and cable if desired.

## **SECTION 7. ASSIGNMENT**

7.1 Lessee shall not assign, hypothecate, or in any manner transfer any interest in this Agreement to any person or entity directly or indirectly, by operation of law or otherwise, without first securing City's express written approval of such transfer.

## **SECTION 8. LIABILITY**

8.1 To the extent governed by applicable state law, each party will be responsible for its own acts and results arising from those actions, and shall not be responsible for the acts of the other party and results arising from those actions.

8.2 Each party agrees, to the extent allowed by law, that it will assume all risk and liability to itself and its agents and employees for any cause of action resulting from any operations or conduct of its agents or employees under this Agreement. Each party's liabilities shall be governed by applicable state law.

8.3 Lessee agrees to indemnify and hold the city harmless for any claim, causes of action, or judgement resulting from Lessee's use of the property or injury or damage to any third party.

## **SECTION 9. INSURANCE**

9.1 Lessor. Lessor maintains Commercial General Liability coverage for the structure.

9.2 Lessee. Lessee shall be responsible for maintaining renter's insurance or business interruption coverage, if desired.

9.3 Immunities. The parties hereto understand and agree that City is relying on and does not waive or intend to waive by any provision of this Agreement, any monetary limitations or any other applicable sovereign, governmental, or official immunities and protections provided by the state of Missouri, from time to time amended, or otherwise available to City, or its elected officials or employees.

## **SECTION 10. DAMAGE OR DESTRUCTION**

If the Premises or any portion thereof are damaged or destroyed at any time during the lease term, the City, as promptly as reasonably practicable and with all due diligence, shall repair or replace the damaged or destroyed Premises to the condition that existed prior to the damage or destruction and the Lessee's rent obligation during that time shall be abated. Or the City may terminate this Agreement without liability and the Lessee's rental obligation shall terminate.

## **SECTION 11. DEFAULTS**

The occurrence of any one or more of the following events shall constitute a material default and breach of this lease Agreement by Lessee:

- A. The failure by Lessee to make any payment of Rent; or any other payment required to be made by Lessee hereunder, as and when due, where such failure shall continue for a period of ten (10) calendar days after written notice from City to Lessee.
- B. The failure by Lessee to comply with Section 5.3 of this Agreement.
- C. An unapproved or unauthorized transfer of any interest acquired under this Agreement.
- D. The occurrence of any other event described as constituting an "Event of Default" elsewhere in this Agreement.
- E. The discovery by City that any material information provided by Lessee related to this Agreement is materially false.

## **SECTION 12. REMEDIES**

In the event of any material default or breach by Lessee, City may at any time thereafter, with or without notice or demand and without limiting City in the exercise of any right or remedy which City may have by reason of such default or breach, avail itself of the following remedies, which are cumulative and not exclusive:

- A. City may recover possession of the leased Premises by any lawful means available to it, including self-entry, in which case this lease Agreement shall terminate immediately and Lessee shall immediately remove all personal property from the Premises. If, after thirty days' notice in writing, Lessee shall fail to remove personal property City may remove such property to another location with Lessee assuming any risk of loss or damage to such property.

## **SECTION 13. TERMINATION**

This lease Agreement is terminable with or without cause by either party upon thirty (30) calendar days written notice setting forth a date of termination of the Agreement. Upon notice of termination, Lessee shall be obligated to pay immediately any Rent, obligations or other fees due and owing to City. By the date given for termination, Lessee shall vacate the Premises and immediately remove all personal property.

If Lessee fails to vacate the Premises or fails to remove all personal property from the Premises, City may enter and recover possession. City may also, at its election, dispose of any remaining personal property and charge all costs associated with such disposal to Lessee. City shall deem any personal property remaining on the Premises as having been abandoned by Lessee.

## **SECTION 14. NOTICES**

All notices, demands, requests or approvals to be given under this lease Agreement shall be given in writing and shall be by hand delivery, overnight mail service, registered or certified mail, or regular first-class mail. All notices, demands, requests or approvals from Lessee to City shall be addressed to:

Brian Crane

City Manager  
 101 West Reed Street  
 Moberly, MO 65270

All notices, demands, requests or approvals from City to Lessee shall be addressed to:

Missouri State Highway Patrol  
 Driver and Vehicle Safety Division  
 Attn: Division Director  
 P.O. Box 568  
 Jefferson City, MO 65102-0568

#### **SECTION 15. MUNICIPAL AUTHORITY**

City may only act through its City Council to approve this Agreement therefore execution of this Agreement is contingent upon approval by the Moberly City Council.

#### **SECTION 16. GOVERNING LAW**

This lease Agreement has been made and shall be construed and interpreted in accordance with the laws of the State of Missouri. Venue may be appropriate in the Randolph County Circuit Court.

#### **SECTION 17. EMPLOYMENT OF UNAUTHORIZED ALIENS PROHIBITED**

Lessee agrees to comply with Missouri Revised Statute Section 285.530 in that Lessee shall not knowingly employ, hire for employment, or continue to employ an unauthorized alien to perform work within the State of Missouri.

#### **SECTION 18. PUBLIC RECORDS ACT**

City is subject to the Missouri Sunshine Law. The Parties agree that this Agreement shall be interpreted in accordance with the provisions of the Missouri Sunshine Law.

#### **SECTION 19. ENTIRE AGREEMENT**

This Agreement represents the entire agreement between the Parties relative to the lease. All previous or contemporaneous contracts, representations, promises and conditions relating to the lease are superseded.

#### **SECTION 15. COUNTERPARTS**

This lease Agreement may be executed in several counterparts, each of which is an original, and all of which together constitute but one and the same document.

#### **SECTION 16. NO PROMISE OF FUNDING**

Other than as specifically set forth herein, this Agreement is not an obligation or commitment of funds, nor a basis for transfer of funds. Each party shall bear its own costs in relation to this Agreement. Expenditures by each party will be subject to applicable budgetary processes and to availability of funds pursuant to applicable laws, regulations, and policies. The parties expressly acknowledge that this in no way implies that any appropriation, tender, or allocation of funds for such expenditures.

**IN WITNESS WHEREOF**, the parties have executed this lease Agreement on the date set forth above.

APPROVED AS TO FORM:

CITY OF MOBERLY, MISSOURI

\_\_\_\_\_  
Randall D. Thompson  
City Attorney

By: \_\_\_\_\_  
Brian Crane  
City Administrator

ATTEST:

\_\_\_\_\_  
City Clerk

LESSEE

\_\_\_\_\_  
Timothy Zike

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_  
 Department: Comm. Dev.  
 Date: September 16, 2019

WS #7.

**Agenda Item:** Review of RFQ for consultant to research the history of Moberly for accuracy.

**Summary:** We have secured funding to develop a historic walking tour app for the City of Moberly. Since that time we have sent out RFP's to hire a certified historian. The historian will be working with the Randolph Co. Historical Society to verify historical accuracy of the stories we wish to feature as part of the tour. We have received one proposal, which has been forwarded to the state historic preservation office.

**Recommended**

**Action:** Direct staff to bring to the October 7<sup>th</sup> Council meeting for final approval.

**Fund Name:**

**Account Number:**

**Available Budget \$:**

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input checked="" type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution	<b>Council Member</b>		
<input checked="" type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice		Passed	Failed
<input type="checkbox"/> Consultant Report	<input checked="" type="checkbox"/> Other _____			



**KEENOY PRESERVATION**  
5229 Oleatha Avenue  
St. Louis, MO 63139  
[rdkeenoy@gmail.com](mailto:rdkeenoy@gmail.com) / 314-637-6441

August 21, 2019

Kay Galloway, City Clerk  
City of Moberly  
101 W. Reed Street  
Moberly, MO 65270

RE: Proposal for RFQ: Moberly History App/Historical Content Verification

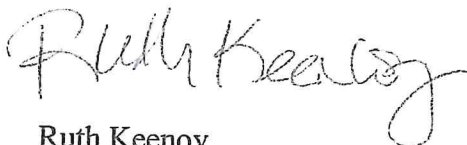
Dear Ms. Galloway,

I wish to submit a proposal to complete the above-referenced project for which the City of Moberly issued a Request for Qualifications (RFQ) on August 8, 2019. The proposal would include a survey team consisting of myself and Terri L. Foley.

The enclosed proposal includes a Scope of Work, Cost Proposal, Professional Qualifications and References.

Terri and I very much appreciate the opportunity to provide this proposal and look forward to hearing of your decision. If you have any questions, please do not hesitate to contact me.

Sincerely,



Ruth Keenoy  
<http://keenoypreservation.com>  
314-637-6441 / [rdkeenoy@gmail.com](mailto:rdkeenoy@gmail.com)

# Cost Proposal - Historical Research & Narrative, History App

Category	Billing Rate	Hours	Cost	Notes
<b>Meetings</b>				
Two public meetings in Moberly	40	3	\$120.00	
			<b>\$120.00</b>	
<b>Travel, Photography &amp; Research</b>				
Public meeting travel	40	10	\$400.00	
Research	40	24	\$960.00	
Photography	40	8	\$320.00	
			<b>\$1,680.00</b>	
<b>Field Evaluation and Research</b>				
<b>Report Preparation</b>				
Research Design	40	4	\$160.00	
Narratives/historical identification	40	64	\$2,560.00	
Revisions	40	4	\$160.00	
			<b>\$2,880.00</b>	
<b>Expenses</b>				
Mileage		\$400.00	\$400.00	Gasoline, mileage
Office Supplies		\$50.00	\$50.00	Paper, printing supplies, etc.
Lodging and Meals		\$400.00	\$400.00	
			<b>\$850.00</b>	
<b>PROJECT TOTAL</b>			<b>\$5,530.00</b>	

Costs Submitted by Ruth Keenoy, rdkeenoy@gmail.com, 314-637-6441  
 Keenoy Preservation, 5229 Oleatha Ave., St. Louis, MO 63139

# **PROPOSAL**

## **HISTORICAL NARRATIVE DEVELOPMENT MOBERLY RANDOLPH COUNTY, MISSOURI**

**Submitted to the City of Moberly**

**August 21, 2019**

Prepared by Ruth Keenoy, Historic Preservation Specialist  
5229 Oleatha Avenue  
St. Louis, MO 63139  
314-637-6441 / rdkeenoy@gmail.com  
<http://keenoypreservation.com/>

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## Introduction

The following proposal was prepared for the City of Moberly, which seeks to contract with a professional consultant to research and develop historical content for an app based historical tour of downtown Moberly. The project will document 100 properties (or less) with historical significance to the Moberly community. Thirty (30) detailed historical narratives for audio purposes (related to the app) will be developed for properties identified in the Request for Qualifications (RFQ) dated August 8, 2019.

If awarded the project, the scope of work will be completed by Ruth Keenoy and Terri Foley (Keenoy Preservation). Ms. Keenoy will be the primary point of contact and direct the project. Ms. Foley will assist with editing and research. Project team members meet the Secretary of Interior's Professional Standards of Qualifications for architectural history as published in the Code of Federal Regulations, 36 CFR Part 61 ([https://www.nps.gov/history/local-law/arch\\_stnds\\_9.htm](https://www.nps.gov/history/local-law/arch_stnds_9.htm)). Ms. Keenoy is a registered Women-Owned Business Enterprise (WBE) in the State of Missouri. Ms. Foley is a registered WBE in the State of North Carolina.

Keenoy Preservation will comply with all applicable City, State and Federal provisions pertaining to non-discrimination, Equal Employment Opportunity, Affirmative Action and the American with Disabilities Act (ADA). All media releases, announcements, published materials, etc. provided as a result of the project will contain the following:

*This material was produced with assistance from the Historic Preservation Fund, administered by the National Park Service, Department of the Interior and Missouri Department of Natural Resources, State Historic Preservation Office. Any opinions, findings, and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the Department of the Interior or the Department of Natural Resources, State Historic Preservation Office. Federal laws prohibit discrimination on the grounds of race, color, sexual orientation, national original disabilities, religion, age or sex. For more information, write to the Office of Equal Opportunity, U.S. Department of the Interior, Washington, D.C. 20240.*

Additional information regarding the scope of work, proposed costs, anticipated deliverables and qualifications are provided in this proposal. Questions regarding the proposal should be addressed to Ruth Keenoy who may be reached at 314-637-6441 / [rdkeenoy@gmail.com](mailto:rdkeenoy@gmail.com).

## Scope of Work

If awarded the contract to complete the proposed project, Keenoy Preservation will complete the activities outlined below. The project – which will produce historical data/information to be used for a history app – is anticipated to begin no later than October 15, 2019 and will be completed no later than June 1, 2020. These dates are based on milestones provided by the RFQ. The City of Moberly and Randolph County Historical Society will provide access to historical data, maps and historic photographs needed to complete the scope of work. The project team will work collaboratively with the Randolph County Historical Society and Moberly Historic Commission to insure historical accuracy of the narratives.

Near the beginning of the project, Ms. Keenoy will develop a research design to be approved by the Missouri State Historic Preservation Office (SHPO). The research design will provide (at minimum) the following information:

- Specific descriptions of the locations to be researched (up to 100 properties).
- Justification for selecting the properties to be researched.
- An outline of the anticipated historical contexts to be included in property narratives.
- Sources for evaluating the properties and developing the historic contexts.
- A description of the research methodology.

A minimum of two public meetings will be conducted by Ruth Keenoy. These meetings will be coordinated with the City of Moberly. One meeting will be held at the beginning of the project to outline the anticipated work and encourage public engagement. A final meeting will summarize the project and answer questions from the public.

The project team will gather information for up to 100 properties selected by the City of Moberly. The properties will be researched to provide the following information:

- Date of construction (if available at City Hall – otherwise construction dates will be estimated using historical maps and city directories).
- Use of the properties since construction (utilizing city directories and newspapers).
- Historical photos (provided through the collections available at Randolph County Historical Society and local citizens).

The project will include photography of all identified properties, to be completed by Ruth Keenoy. Photos will be provided in digital format as jpegs and labeled by address.

In addition to the research/photos for the 100 (or less) properties identified by the City, the project team will develop detailed historical narratives for 30 notable properties identified in the

RFQ. The content will be utilized for audio purposes (related to the app). Narrative text will be reviewed and approved by the City of Moberly, Moberly Historic Commission, Randolph Historical Society and SHPO prior to submission of the content to the app developer.

Following completion and approval of the research portion of the project, a final report will be prepared. The report will describe the scope and scale of the project and provide historic contexts for evaluation of the resources.



## Qualifications

Keenoy Preservation meets the Secretary of Interior's Professional Standards of Qualifications for architectural history as published in the Code of Federal Regulations, 36 CFR Part 61 ([https://www.nps.gov/history/local-law/arch\\_stnds\\_9.htm](https://www.nps.gov/history/local-law/arch_stnds_9.htm)).

Ms. Keenoy holds a master's degree in history and has worked as an architectural historian for more than 25 years. She has completed a number of historic preservation projects including National Register nominations, architectural/historical surveys, Section 106 mitigation, and Section 4(f) compliance. Ms. Foley holds a bachelor's degree in historic preservation with an emphasis in architectural design. She has worked as a preservation consultant for 17 years. She has completed numerous surveys and National Register nominations, as well as design review guidelines and Section 106 mitigation.

Keenoy Preservation has previously worked with the City of Moberly the following projects:

- Moberly Re-Survey of Commercial Downtown District (completed 2018)
- National Register Nomination – update and expansion (Moberly Commercial Downtown District), pending final approval by National Park Service (2019).

In relation to the scope of services outlined in the City's Request for Proposal (RFP), the consultant team has worked together on projects in the states of Missouri, Kansas, Maine and New York, as outlined specifically in one (or both) of the resumes provided with the proposal. Neither Ms. Foley nor Ms. Keenoy has failed to meet project deadlines in the past. All projects have been completed on time and within the proposed budget.

Additional information about the project team's qualifications and an overview of completed projects are provided in the resumes submitted as part of this proposal.



## Professional References for Ruth Keenoy

Russell Halliday  
Program Manager, Stantec  
St. Louis Development Corporation  
1520 Market Street, Suite 2000  
St. Louis, MO 63103  
314-657-3743  
[rhalliday@stlouis-mo.gov](mailto:rhalliday@stlouis-mo.gov)

Betsy Bradley  
Academic Specialist for Historic Preservation  
Goucher College  
1021 Dulaney Valley Road  
Baltimore, MD 21204  
509-822-0300  
[betsy.bradley1@gmail.com](mailto:betsy.bradley1@gmail.com)

Jefferson G. Mansell  
Historian, Natchez National Historical Park  
Melrose Montebello Parkway  
Natchez, MS 39120  
314-956-9955  
[jmansell62@gmail.com](mailto:jmansell62@gmail.com)

Tim Paris  
Planner II / Historic Preservation  
City of Topeka  
620 SE Madison  
Topeka, KS 66607  
785-368-3013  
[tparis@topeka.org](mailto:tparis@topeka.org)

## Professional References for Terri L. Foley

Nevada Young  
City Clerk/Treasurer  
City of Poplar Bluff  
501 Vine Street  
Poplar Bluff, MO 63901  
573-686-8615  
[nyoung@pbutilities.com](mailto:nyoung@pbutilities.com)

Erin B. Turner-Forcum  
Community Development Coordinator  
City of Webb City  
112 W Broadway St  
Webb City, MO 64870  
417-499-6367  
[eturner@webbcity.org](mailto:eturner@webbcity.org)

Scott Hanson  
City Planner  
City of Edwardsville  
200 E. Park Street  
Edwardsville, IL 63025  
618-692-7535  
[shanson@cityofedwardsville.com](mailto:shanson@cityofedwardsville.com)

## Resume – Ruth Keenoy

5229 Oleatha Avenue  
St. Louis, Missouri 63139  
314-637-6441  
rdkeenoy@gmail.com

### Education

B.B.A., Business Administration, Middle Tennessee State University, 1985  
M.A., History, Middle Tennessee State University, 1995

### Professional Work History

Historic Preservation Consultant, Self-Employed, St. Louis, 2006-2010; 2016-present  
Project Manager, Historical Mitigation, National Geospatial-Intelligence Agency (NGA) Relocation, St. Louis, MO, 2016 - present  
Preservation Specialist, Landmarks Association of St. Louis, Inc., 2010 – 2016  
Senior Preservation Planner, TRC, Atlanta, GA (Nashville branch office), 2000-2006  
Historic Preservation Specialist, Tennessee Dept. of Transportation, 1997 – 2000  
Architectural Historian, TRC Mariah Associates, Inc., Austin, TX, 1996-1997  
Private Consultant/Architectural Historian, Self-Employed, 1996-1997  
Preservation Planner, Thomason & Associates, Nashville, TN, 1994-1996

### Technical and Professional Experience

- Cultural Resource Management plans
- Cultural Resource Surveys
- Environmental Impact Assessments and Statements
- HABS/HAER Evaluations
- National Register of Historic Places Nomination Preparation
- Section 106 and Section 4(f) Compliance

### Specialized Training & Qualifications

- *National Register Nomination/Criterion Consideration G (Properties That Have Achieved Significance Within the Past Fifty Years) Workshop*. Sponsored by the Missouri State Historic Preservation Office. Conducted by Dan Vivian, National Park Service, Washington, D.C. (Jefferson City, Missouri, 2007).
- *Historic Preservation Tax Credit Workshop*. Sponsored by Missouri Alliance for Historic Preservation (Springfield, Missouri, 2005).
- *Revised Regulations, Section 106 Workshop*. Conducted by the National Park Service, Washington, D.C. (Atlanta, Georgia, 1999).

### Experience Overview

Projects completed in Alabama, California, Georgia, Illinois, Kentucky, Maine, Michigan, Mississippi, Missouri, New Mexico, New Jersey, New York, North Carolina, Tennessee, Texas, Virginia and West Virginia. NRHP nominations and survey reports completed in Missouri are available online at <https://dnr.mo.gov/shpo/mnrlist.htm> (National Register) and <https://dnr.mo.gov/shpo/survey-eg.htm> (Survey). Worked with federal, state, county and city governments, as well as private citizens and non-profit organizations.

## Sample Projects, 2008 - 2019

### Survey & Section 106 Projects

(Link to digitized survey reports in Missouri: <https://dnr.mo.gov/shpo/survey-eg.htm>)

- *Barker Neighborhood Intensive Survey*. Completed for City of Lawrence, Kansas, 2019. In progress.
- *North Central Neighborhood Survey*. Completed for City of Columbia, Missouri, 2019. In progress.
- *Collins Park Intensive Neighborhood Survey*. Completed for the City of Topeka, Kansas, 2017-2018. Survey report available at: [https://www.kshs.org/resource/survey/topeka\\_collinsparksurvey2018.pdf](https://www.kshs.org/resource/survey/topeka_collinsparksurvey2018.pdf)
- *Intensive Resurvey, Moberly Missouri (Downtown Commercial and Industrial Properties)*. Prepared for the City of Moberly, Missouri 2017-2018.
- *Shoe Industry Context, City of St. Louis*. Prepared for Section 106/NGA relocation project. St. Louis City, MO, 2016.
- *Washington, Missouri, Fifth Street Survey*. Survey completed to identify potentially eligible (individual and district-related) properties for the City of Washington, Missouri. Franklin County, MO, 2014.
- *College Hill Neighborhood Survey*. Survey and report completed for the City of St. Louis, Missouri, to identify eligible properties for the NRHP. St. Louis City, MO (2012).
- *Bellefontaine Habilitation Center*. Section 106 compliance for the State of Missouri. Report included history of site and documentation of all properties constructed prior to 1960. St. Louis County, MO (2011).
- *Locust Historic Study Area, Columbia*. Survey of area surrounding University of Missouri campus and downtown immediately north of campus for potential new east/west connector. Boone County, MO, 2009.
- *Troy Downtown Commercial Survey*. Survey completed for the City of Troy in anticipation of historic district nomination. Lincoln County, MO, 2010.
- *Survey, St. Lawrence vicinity, New York*. Two Section 106 survey projects completed for British Petroleum (BP) wind tower projects near Clayton and Cape Vincent. Jefferson County, NY, 2008.
- *Survey, Bucksport, Maine*. Section 106 survey project completed in anticipation of power line project. Hancock County, ME, 2008.

### National Register of Historic Places (NRHP) Nominations

(Link to digitized National Register Nominations, Missouri: <https://dnr.mo.gov/shpo/mnrlist.htm>)

- Wepprich Winery, St. Charles, Missouri. Approved by City Council July 2019. Approved by Missouri Advisory Council August 2019.
- Alton Gas & Electric Power House, Alton, Missouri. Approved by City of Alton and Illinois Historic Sites Advisory Council, June-July 2019. Pending formal listing to the National Register of Historic Places.
- Appleton City, Missouri, Downtown Historic Commercial District. Listed to the National Register of Historic Places 2019.
- National Register nominations (3) prepared for National Geospatial Agency historical mitigation project, St. Louis, MO. Crunden Branch Library (2000 Cass Avenue), Pruitt School (1212 N. 22<sup>nd</sup> Street) and Jefferson-Cass Health Clinic (1421 N. Jefferson Avenue). Nominations formally listed to the NRHP in 2017-2018.
- Devil's Elbow Historic District (Route 66), Pulaski County, MO. Property nominated under Route 66 in Missouri Multiple Property Documentation Form [MPDF]. Listed to the NRHP in 2017.



- Piney Beach (Route 66), Pulaski County, MO. Property nominated under Route 66 in Missouri Multiple Property Documentation Form [MPDF]. Listed to the NRHP in 2017.
- *Brahm-Mitchellette Motor Car Company*, 3537 S. Kingshighway, St. Louis City, Missouri. Property nominated under the associated MPDF for Auto-Related Sales/Service, St. Louis City, Criteria A and C. Listed to the NRHP in 2015.
- *Claverach-Park Historic District*, St. Louis County, Missouri (Section 8, only, Criterion C), Listed to the NRHP in 2015.
- *Bellefontaine Cemetery*, St. Louis City, Missouri (National Significance), Criterion C. Listed to the NRHP in 2014.
- *Salem Baptist Church*, Alton (Madison County), Illinois. Criterion A (Ethnic Heritage). Listed to the NRHP in 2013.
- *Downtown Troy Historic District*, Troy (Lincoln County), Missouri. Criteria A and C. Listed to the NRHP in 2013.
- *Hyde Park Boundary Extension*, Certified Local District, St. Louis City, Missouri. Listed to the NRHP in 2013.
- *Lindell Park Historic District*, St. Louis City, Missouri. Listed to the NRHP in 2012.
- *Route 66 Steak & Shake*, Springfield (Green County), Missouri. Criteria A and C. Property listed under the associated MPDF for Route 66) in 2012.
- *William D. Lange Subdivision* (Historic District), St. Louis City, Missouri. Criterion C. Listed to the NRHP in 2011.
- *Berry Motor Car Service Building*, 2220 Washington Avenue, St. Louis City, Missouri, Property listed under the associated MPDF for Auto-Related Sales/Service, St. Louis City, Criterion A. Listed to the NRHP in 2010.
- *Route 66 in Missouri*, MPDF, 2009. Project included individual listing of the *Meramec River Route 66 Bridge*, St. Louis County. Listed to the NRHP in 2009.
- *Fredericktown Courthouse Square District* (Madison County), Missouri. Criteria A and C. Listed to the NRHP in 2009.
- *Bennett Avenue Historic District*, Richmond Heights (St. Louis County), Missouri. Criterion A (Ethnic History). Listed to the NRHP in 2008.

#### Oral History Projects

- Project Manager, National Geospatial Intelligence-Agency (NGA) Relocation / Historical Mitigation, St. Louis, MO (2016). Twelve interviews include residents (current and former) of the St. Louis Place and Jeff-Vander-Lou neighborhoods in St. Louis, Missouri. Some of the individuals interviewed were forced to move from their homes when the City secured 107 residential acres for the new NGA headquarters. One interview features three family members associated with the project's sole property relocation – a nineteenth-century brick dwelling owned by the family since the 1940s. Videos (and one audio interview) available at: <https://www.stlouis-mo.gov/government/departments/slhc/project-connect/nga/history/>
- History of Gateway National Bank, 3412 N. Union Boulevard, St. Louis, MO (2015). Project completed as Section 106 compliance for demolition of Missouri's first African-American owned commercial bank. Interviews (video and audio) include (but are not limited to) one of the bank's founders, former board members, the bank's architect and former employees. Project included content for a permanent exhibit at the St. Louis Community Credit Union, Gateway Branch (3412 N. Union Boulevard). The building's history and project interviews are available at: <http://gatewavslccu.com/>

### Public Presentations (2015-2019)

- “Missouri Courthouses and the Architects Who Designed Them.” Kellerman Foundation for Historic Preservation (Cape Girardeau, MO), January 18, 2019.
- “Salem School and Architect Henry H. Hohenschild” (with Ryan J. Reed), Missouri Preservation Conference (Sedalia, MO), 2018.
- Public History Presentations on Gateway National Bank and Neighborhood Committee project, St. Louis. Presented to M.A. students at Goucher College, Summer Residency, July 22-26, 2017.
- “History of Gateway National Bank, St. Louis, MO.” Missouri Preservation Conference (Hannibal, MO), 2017.
- Women of the Grapevine (St. Louis Professional Women’s Group), 2017. Topic: Historic St. Louis Architecture.
- “The Gateway City Function Continues: Industry, Commerce and Transportation, an Untold Story of the Post WWII Era,” (with Betsy Bradley). Missouri Preservation Conference (Cape Girardeau, MO), 2016.
- “Show Me 66: Main Street Through Missouri,” Interview for documentary about Route 66 in Missouri (Missouri History Museum, 2016). Trailer available at: <https://www.youtube.com/watch?v=vstYlwQT2M0>
- “History of Gateway National Bank,” Interview about the history of Missouri’s first African-American owned commercial bank (“Living St. Louis,” KETC, 2016). Episode available at: <https://www.youtube.com/watch?v=97Hq2HKCS3Y>
- Missouri Conference on History, 2015. Parks, Cemeteries and Landscapes: *Bellefontaine Cemetery* (with Nancy Ylvisaker).
- Missouri Alliance for Historic Preservation, Bismarck Depot Day, 2014. *The History of Bismarck Depot and Why it is Important to YOU!* (Presented to Bismarck R-V Elementary School Students).
- Richmond Heights Historical Society, Centennial Celebration Lecture Series, 2013. *History of the Bennett Avenue Neighborhood*.
- Introduction to Architecture and Historic Preservation (*Architecture / Preservation; Past / Future*). Rockwood School District / Center for Creative Learning (Presented to 5<sup>th</sup> Grade Gifted Students), 2013.

### **Professional Affiliations**

Campbell House (St. Louis, Missouri)

Missouri Alliance for Historic Preservation (Board Member)

Route 66 Association of Missouri (Board Member/Treasurer)

Road Ahead Partnership, Route 66 (Neon Preservation/Historic Preservation Task Member)

Shawnee County Historical Society (Kansas)

Society of Architectural Historians

Society for the History of Technology

## Publications

- “Mount Moriah Temple in Lindell Park,” *Society of Architectural Historians (St. Louis) Newsletter* (Spring 2018). Available at: <http://www.stlouisarchitecture.org/pdf/2018%20Spring%20B.pdf>
- Co-author (Ruth Nichols Keenoy with Joellen Gamp McDonald). *Richmond Heights: 1868 – 1940*. Charleston, SC: Arcadia Publishing Company, 2006.
- Co-author (Ruth Nichols with Robbie D. Jones). “Caving and Clogging: Keepin’ Cool in Tennessee Caves, 1920-1950,” *Looking Beyond the Dixie Highway*. Knoxville, TN: University of Tennessee Press, 2006.
- Two entries (Ruth Nichols) entitled, “Arthurdale” and “Cumberland Homesteads,” *The Encyclopedia of Appalachia*. Knoxville, TN: University of Tennessee Press, 2006.
- Seven entries (Ruth Nichols) entitled, “The Civilian Conservation Corps,” “Booker T. Washington State Park,” “Chickasaw State Park,” “Natchez Trace State Park,” “Fall Creek Falls State Park,” “Montgomery Bell State Park,” and “T.O. Fuller State Park,” *The Tennessee Encyclopedia of History & Culture*. Nashville, TN: Rutledge Hill Press, 1998. Articles available at: <https://tennesseeencyclopedia.net/staff/ruth-d-nichols/>



## Terri L. Foley

8812 Sedgley Drive, Wilmington, NC 28412 | 573-382-8590 | [tfoley@zoho.com](mailto:tfoley@zoho.com)  
[historicpreservationconsult.com](http://historicpreservationconsult.com) | [housebuildinghistories.com](http://housebuildinghistories.com)

### Education

**B. S. | 2002 | Southeast Missouri State University**

Major: Historic Preservation

Minor: Architectural Design

Related coursework: Photography

Specialized Training: National Main Street

### Professional Overview

Terri L. Foley has over 15 years' historic preservation experience related to downtown development and economic revitalization. As a historic preservation specialist, she is committed to assisting communities with the economic vitality and revitalization of their historic downtown cores, commercial districts, urban commercial corridors, business improvement districts and residential areas. Working relationships include local and state governments, Main Street programs, redevelopment agencies, business associations, chambers of commerce, business improvement districts, community development organizations, downtown organizations, developers, non-profit groups, architectural firms, archaeologists and historic preservation specialists.

### Technical and Professional Experience

- Revitalization and Economic Development/Vitality
- Design Review Guidelines
- Building Code Compliance
- Building Commendation Procedures
- Cultural Resource Management
- Land-Use/Building Condition Assessments and Reports
- Environmental Impact Assessments and Statements
- Community Development Block Grants
- HABS/HAER Evaluations
- National Register of Historic Places Nomination Preparation
- Section 106 and Section 4(1) Compliance
- Area of Potential Effect

### Specialized Training and Qualifications

**National Main Street – 4-Points Approach.** Old Town Cape, Inc. Cape Girardeau, Missouri. (2001 – 2009).

**Revitalization of Historic Commercial Districts.** Training workshop held for Certified Local Government communities, emphasis on the revitalization of commercial districts with an overview of the Main Street Approach and Principals. Sponsored by City of Poplar Bluff and Missouri State Historic Preservation Office, Poplar Bluff, Missouri. (April 2014).

**Design Guidelines Workshop.** Sponsored by Old Town Cape, Inc., City of Cape Girardeau, Missouri, Cape Girardeau Chamber of Commerce, and DREAM Initiative. Workshop conducted by Peckham Guyton Albers & Viets, Inc. (Cape Girardeau, Missouri, 2007).

**Upstairs Downtown Workshop.** Sponsored by Illinois Historic Preservation Agency and Illinois Main Street. Workshop training on Accessibility Code, Introduction and Building Assessment, Building Codes & Life Safety, Energy Conservation, Feasibility Studies & Pro-Formas, Insurance, Community Incentives, and Tax Incentives. (Alton, Illinois, 2007).

**Land Use, Building, and Infrastructure Survey Workshop.** Sponsored by Old Town Cape, Inc., City of Cape Girardeau, Missouri, Cape Girardeau Chamber of Commerce, and DREAM Initiative. Workshop conducted by Peckham Guyton Albers & Viets, Inc. (Cape Girardeau, Missouri, 2007).

**National Register Nomination/Criterion Consideration G (Properties That Have Achieved Significance Within the Past Fifty Years) Workshop.** Sponsored by Missouri State Historic Preservation Office. Conducted by Dan Vivian, National Park Service, Washington, D.C. (Jefferson City, Missouri, 2007)

**National Register Nomination Workshop.** Sponsored by the Missouri State Historic Preservation Office. Conducted by Tiffany Patterson, National Register Coordinator. (Jefferson City, Missouri, 2006).

## Experience

### Historic Preservation Specialist | freelance | 2002 - Present

#### National Register of Historic Places Experience

**Garfield Historic District** (Listed for ethnic/African American significance) (Poplar Bluff, Missouri), 914-921 Garfield Street, Poplar Bluff, MO. (NR listed 10/02/2017) (<https://dnr.mo.gov/shpo/butler.htm>).

**Christian Weinrich House** (Chester, Illinois) 217 Opdyke, Chester, IL. (NR listed 06/20/2018).

**Frederick Weister House** (Chester, Illinois), Chestnut and Taylor Streets, Chester, IL. (NR listed 06/15/2018).

**Old Fire Station** (Chester, Illinois), 822 Swanwick, Chester, IL. (NR listed 06/15/2018).

**Cynthia-Kinzer Historic District** (Poplar Bluff, Missouri), Cynthia and Kinzer and adjacent side streets, Poplar Bluff, MO., (NR Listed 07/21/2015) (<http://dnr.mo.gov/shpo/nps-nr/15000441.pdf>).

**Downtown Webb City Historic District** (Webb City, Missouri), North and South Main and adjacent side streets, Webb City, MO., (NR Listed 07/18/2014) (<http://www.dnr.mo.gov/shpo/Jasper.htm>).

**Broadway-Middle Commercial Historic District (Boundary Increase)** (Cape Girardeau, Missouri), 400 block of Broadway Street, Cape Girardeau, MO.; Partnered with Dr. Steven J. Hoffman and students from the Southeast Missouri State University Historic Preservation Program and Karen Bode Baxter, (NR Listed 09/14/2013) (<http://dnr.mo.gov/shpo/nps-nr/13000672.pdf>).

**North Main Street Historic District** (Poplar Bluff, Missouri), 400 block of North Main Street, Poplar Bluff, MO., (NR listed 07/14/11) (<http://www.dnr.mo.gov/shpo/nps-nr/11000440.pdf>).



**Multiple Property Documentation Form – Route 66 in Missouri & Multiple Property Listing, and Meramec River U.S. Bridge – J421 (Preferred)**, St. Louis County, Missouri, Project completed for the Missouri State Historic Preservation Office, Department of Natural Resources. Grant funded by the National Park Service. The Multiple Property Form addresses the context of commercial roadside architecture in Missouri along Route 66. (<http://www.nps.gov/history/rt66/HistSig/MissouriMPDF.pdf>) The individual bridge nomination is a resource on an extant section of the road located in Route 66 Park, St. Louis County (near Eureka), Missouri. (<http://www.dnr.mo.gov/shpo/nps-nr/09000888.pdf>) MPDF and nomination were co-written with Ruth Keenoy, (NR listed 09/16/ 2009).

**Johnson County Courthouse**, Vienna, Johnson County, Illinois (NR listed 09/09/2010).

**Erlbacher Buildings**, (Cape Girardeau, Missouri, MPS) 1105 and 1107 Broadway, Cape Girardeau, Missouri, (NR listed 07/08/2009) (<http://www.dnr.mo.gov/shpo/nps-nr/09000502.pdf>).

**Main-Spanish Commercial Historic District**, (Cape Girardeau, Missouri, MPS), 100 block of Main and Spanish Streets and adjacent portions of Themis and Independence Streets, Cape Girardeau, Missouri; Partnered with Dr. Steven J. Hoffman and Morgan Lake, (NR listed 12/30/2008) (<http://www.dnr.mo.gov/shpo/nps-nr/08001259.pdf>).

**Cape Girardeau Commercial Historic District (Boundary Increase II)**, (Cape Girardeau, Missouri, MPS) 127 North Water Street, Cape Girardeau, Missouri; Partnered with Dr. Steven J. Hoffman, (NR listed 08/29/2008) (<http://www.dnr.mo.gov/shpo/nps-nr/08000808.pdf>).

**Central High School (Preferred), Louis J. Schultz School**, 101 South Pacific Street, Cape Girardeau, Missouri; Partnered with Ruth Keenoy and Karen Bode Baxter, (NR listed 07/18/2008) (<http://www.dnr.mo.gov/shpo/nps-nr/08000663.pdf>).

**Lilly, Edward S. and Mary Annatolie Albert, House**, 129 South Lorimier, Cape Girardeau, Missouri, (NR listed 06/20/2008) (<http://www.dnr.mo.gov/shpo/nps-nr/08000535.pdf>).

**Cape Girardeau Commercial Historic District (Boundary Increase)**, (Cape Girardeau, Missouri, MPS) 101 North Main Street, Cape Girardeau, Missouri, (listed 07/11/2007) (<http://www.dnr.mo.gov/shpo/nps-nr/07000683.pdf>).

**Broadway-Middle Commercial Historic District**, 500 block of Broadway and 100 block of North Middle, Cape Girardeau, Missouri (Cape Girardeau, Missouri MPS); Partnered with Dr. Steven J. Hoffman and students from the Southeast Missouri State University Historic Preservation Program, (NR listed 07/24/2007) (<http://www.dnr.mo.gov/shpo/nps-nr/07000753.pdf>).

**Byrd, Abraham, House**, 2832 Ct. Rd 442 Jackson, Missouri (NR listed 06/21/2007) (<http://www.dnr.mo.gov/shpo/nps-nr/07000572.pdf>).

**Egger and Company General Store**, 19 PCR 328, Farrar, Missouri (NR listed 06/21/2007) (<http://www.dnr.mo.gov/shpo/nps-nr/07000570.pdf>).

**Harrison, William Henry & Lilla Luce, House**, 313 Themis, Cape Girardeau, Missouri; Partnered with Dr. Steven J. Hoffman and students from the Southeast Missouri State University Historic Preservation Program, (NR listed 12/06/2005) (<http://www.dnr.mo.gov/shpo/nps-nr/05001375.pdf>).

**Kage School**, 3110 Kage Road, Cape Girardeau, Missouri; Partnered with Heather Carey, archeologist, (NR listed 09/25/2005) (<http://www.dnr.mo.gov/shpo/nps-nr/05001090.pdf>).

**Old Lorimier Cemetery**, 500 N. Fountain, Cape Girardeau, Missouri; Partnered with Brenda Schloss, Planning Services, City of Cape Girardeau, (NR listed 09/28/2005) (<http://www.dnr.mo.gov/shpo/nps-nr/05001091.pdf>).

**Esquire Theater**, (Cape Girardeau, Missouri MPS) 824 Broadway, Cape Girardeau, Missouri, (NR listed 09/15/2005) (<http://www.dnr.mo.gov/shpo/nps-nr/05001025.pdf>).

**Southeast Missourian Building**, (Cape Girardeau, Missouri MPS), 301 Broadway, Cape Girardeau, Missouri; Partnered with Dr. Steven J. Hoffman and students from the Southeast Missouri State University Historic Preservation Program, (NR listed 06/01/2005) (<http://www.dnr.mo.gov/shpo/nps-nr/05000509.pdf>).

**Fairview Cemetery**, Van Buren, Arkansas, partnered with Randy Smith, (NR listed 06/01/2005).

**Warehouse Row Historic District**, (Cape Girardeau, Missouri, MPS) 19 North Water, Cape Girardeau, Missouri, (NR listed 12/04/2004) (<http://www.dnr.mo.gov/shpo/nps-nr/04001285.pdf>).

#### Architectural Survey Section 106 Experience

**North Central Neighborhood Survey Missouri** – An architectural inventory of cultural resources in Columbia, Missouri. Completed for City of Columbia, Missouri 2019. In progress.

**Barker Neighborhood Intensive Survey**– An architectural inventory of cultural resources in Lawrence, Kansas. Completed for City of Lawrence, Kansas, 2019. In progress.

**Moberly Intensive Architectural Survey, Moberly, Missouri** – An architectural inventory of cultural resources in the downtown district of Moberly, Missouri. Project for the City of Moberly and funded in by the Missouri State Historic Preservation Office. Survey to include evaluation of approximately 200 buildings and NRHP eligibility. (November 2017 – May 2018).

**Collins Park Neighborhood Historical Survey, Topeka, Kansas** - An architectural inventory of cultural resources in Topeka, Kansas. Project for the City of Topeka and funded in by the Kansas State Historic Preservation Office. Survey to include evaluation of approximately 184 buildings and NRHP eligibility. (November 2017 – May 2018).

**Grandview Place, Edwardsville, Illinois** – Conducted a survey mid-century modern residential subdivision developed on historic mine land. Project completed for the City of Edwardsville and funded in part by a Certified Local Government grant. The survey included 186 residential buildings, three secondary buildings and approximately 69 objects. (November 2015 – April 2016).

**HABS/HAER Documentation of LORAN-C Towers, Wilmington, North Carolina** – Conducted HABS/HAER survey that entailed the documentation of the United States Coast Guard Carolina Beach LORAN-C Station including all buildings and four LORAN-C Towers. Prepared a detailed report on the history of the evolution of the LORAN system, history of the site, photographic documentation, LORAN patent information, site maps and engineer plans of towers, and Global Positioning System. (September 2013 to June 2014).

**St. Claire Cell Tower, St. Claire, Missouri** – Determined the potential viewshed impact with the construction of a cell tower. Completed architectural report. Project was sub-contracted with Algonquin Consultants, Inc. (March 2014).

**Parkview Cell Tower, Parkview, Missouri** – Determined the potential viewshed impact with the construction of a cell tower. Completed architectural report. Project was sub-contracted with Algonquin Consultants, Inc. (February 2014).

**Land Use, Building, and Infrastructure Survey, Poplar Bluff, Missouri** – Conducted a survey project that entailed surveying the conditions of buildings, land-use and infrastructure in the historic district of Poplar Bluff, Missouri. The survey area included approximately 68 buildings in a 27-block area, including



NRHP-listed resources. Project completed for the City of Poplar Bluff and funded in part by the Missouri State Historic Preservation Office. (June 2012 –April 2013).

**Architectural Inventory, Sikeston, Missouri** – Conducted an architectural inventory of cultural resources in Sikeston, Missouri. Project completed for the City of Sikeston and Historic Midtown Development Group (Missouri Main Street organization) and funded in part by the Missouri Department of Economic Development. Survey included evaluation of 75 buildings including one NRHP- listed resource and two districts recommended as NRHP-eligible. (July-September 2011).

**Architectural Inventory, Columbia, Missouri** – Conducted an architectural inventory of cultural resources in Columbia, Missouri. Project completed for the City of Columbia and funded in part by the Missouri State Historic Preservation Office. Survey included evaluation of 57 buildings, including one NRHP-listed resource and five properties recommended as NRHP-eligible. (June – September 2008)

**Architectural Inventory and Section 106, Bucksport (Hancock County), Maine** – Conducted an architectural inventory of cultural resources in Bucksport, Maine. Project completed for Maine Central Power. Survey included evaluation of 120 buildings, including four NRHP-listed resources and eight properties recommended as NRHP-eligible (Summer 2008).

**Architectural Inventory and Section 106, Jefferson County, New York** – Conducted an architectural inventory for a wind power project, St. Lawrence Wind Farm, proposed for Jefferson County, New York near Cape Vincent. Survey project included evaluation of National Register listed and eligible properties surrounding the proposed project zone, within a five-mile radius. The project necessitated coordination with the New York State Historic Preservation Office. Approximately 100 individual properties were recorded; approximately 30% of which were identified as listed in, or potentially eligible for, the National Register of Historic Places. One historic district was identified, Chaumont, New York, and an increased National Register boundary was recommended. (Fall 2007).

**Land Use, Building, and Infrastructure Survey** – DREAM Initiative Project - Worked as part of a team on a grant-funded project that entailed surveying the conditions of buildings and infrastructure in the historic district of Cape Girardeau, Missouri. The survey area included approximately 650 buildings and 590 parcels of land. Partnership with the City of Cape Girardeau, Old Town Cape, Inc., and Peckham Guyton Albers & Viets, Inc. (Summer 2007).

**Architectural Inventory, Cape Girardeau, Missouri** – Conducted an architectural inventory of residential and commercial buildings in the blocks of Pacific and William Streets. Survey project included documentation of buildings, development of an historical overview and individual architectural descriptions. Project required coordination with the City of Cape Girardeau and Historic Preservation Program of Southeast Missouri State University. (Spring 2000)

#### Design Review Guideline Projects

**Architectural Design Guidelines City of Ponca City, Oklahoma** –Prepared design guidelines for the community’s residential historic districts, Ponca City, Oklahoma (June – September 2014) ([www.poncacityok.gov/DocumentCenter/View/4131](http://www.poncacityok.gov/DocumentCenter/View/4131)).

**Architectural Design Guidelines City of Poplar Bluff, Missouri** –Prepared design guidelines for commercial and residential historic districts, Poplar Bluff, Missouri (September 2013 – June 2014) (<http://www.poplarbluff-mo.gov/DocumentCenter/View/104>).

**Architectural Design Guidelines Muscle Shoals Reservation** – Prepared design guidelines for Muscle Shoals Reservation (industrial sites) for conversion of area as public business district, Muscle Shoals, Alabama (September 2013)([http://www.tva.gov/environment/reports/muscle\\_shoals\\_comprehensive\\_master\\_plan/Appendix%20G\\_MSR%20DRG%20rev%20t1f1.pdf](http://www.tva.gov/environment/reports/muscle_shoals_comprehensive_master_plan/Appendix%20G_MSR%20DRG%20rev%20t1f1.pdf)).

**Architectural Design Guidelines City of Cape Girardeau, Missouri (Old Town Cape District)** - As a board member and design committee representative of Old Town Cape (Missouri Main Street organization) and as a historic preservation consultant, participated in preparing and editing “Building and Streetscape Design Guidelines for Cape Girardeau, Missouri,” (2008-2009, with PVG Urban Consulting); project was part of the DREAM Initiative (Downtown Revitalization and Economic Assistance for Missouri) program and sponsored by Old Town Cape, City of Cape Girardeau, Missouri Department of Economic Development, Missouri Development Finance Board, and Missouri Housing Development Commission. Prepared original “Old Town Cape Architectural Design Guidelines,” (with Robert Bettis, et al), May 2002; [guidelines updated 2009]).

#### Professional Affiliations

**Past President, Old Town Cape, Inc.** – 2008-2009; President – 2007-2008; Board Member 2005-2009, Design Committee – 2001-2009. National Main Street program, which currently comprises 130 blocks in downtown Cape Girardeau, Missouri.

**Vice-President, Cape River Heritage Museum** – 2004-2005; Board Member 2003-2005

**Vice-President, Zonta Club of Cape Girardeau, Missouri** – 2004-2005; Board Member 2004- 2006; Advisor to Board 2006-2009.

#### Publications

**“Lost and Saved,”** *Southeast Missourian*, Weekly Sunday Column, January 2006 through July 2007, Cape Girardeau, Missouri. Column paired photographs of examples of existing buildings with related demolished buildings and included short history of each.

(<http://www.semissourian.com/databases/landmarks>).

**Empty Lot Was One Home To Piece of Cape Girardeau's History,** *Southeast Missourian*, Cape Girardeau, Missouri, 2008.(<http://www.semissourian.com/story/1486009.html>).

**Hartle Has Great Plans For Old Schultz School,** *Southeast Missourian*, Cape Girardeau, Missouri, 2009.

(<http://www.semissourian.com/story/1504170.html>).

**Co-Editor, Cape Girardeau Faces and Places, Vol. II,** Rust Communications; Concord Publishing House, 2006.



Historian

CITY OF MOBERLY

"BID OPENING"  
Sign-In Sheet

Date: 8.27.2019, 3:04pm

Name

Company

Shannon Hance

City of Moberly, Mo

Emily Dejea-Furlong

City of Moberly, mo.

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CITY OF MOBERLY

“BID OPENING”

Date: 8-27-19

Ruth Keenoy \$ 5,530

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# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_ WS #8.

Department: Comm. Dev.

Date: September 16, 2019

**Agenda Item:** Review of RFP for historic walking tour application

**Summary:** We have secured funding to develop a historic walking tour app for the City of Moberly. Since that time we have sent out RFP's to hire a company to create the app and content. The company will be working with a selected historian to build the app and create the content. The selected company will also participate in two public meetings to discuss the project and listen to community feedback/input. We have received three proposals for this project, which have been forwarded to the state historic preservation office for review.

**Recommended**

**Action:** Direct staff to bring to the October 7<sup>th</sup> Council meeting for final approval.

**Fund Name:**

**Account Number:**

**Available Budget \$:**

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input checked="" type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution	<b>Council Member</b>		
<input type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice			
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed



# Tour Buddy Apps

Mobile App & Interactive Tour Map Proposal for the City of Moberly

**Date: August 14, 2019**

**RE: Proposal for Running Tour App**

**To: Emily Goyea and City of Moberly**

## Overview

We would like to formally apply to help the City of Moberly create an interactive tour map as a downloadable mobile app and as a website. Tour Buddy Apps has been in the mobile app business for 9 years and understands what it takes to successfully create and launch mobile apps and websites. Here are the **MUST HAVES** for this project that Tour Buddy is ready to deliver:

- **Historic Walking Tour App and Website that promotes the city's story and tourism**  
App will be searchable on the App Store and Google Play with on average 20 keywords as well as the website that can be displayed to promote the tour as well. Tour Buddy can create a QR code for the app and website to make it easy to access.
- **100 points of interest in the tour**  
Tour Buddy can input all images, text, links, GPS points and audio.
- **30 points of interest will have audio narration recorded by a professional voice over artist**  
Tour Buddy can provide samples and arrange for recording and input the files.
- **GPS enabled app and website**  
Tour Buddy's mobile app and website are both GPS enabled.
- **Images are offline**  
Tour Buddy's app provides the images offline. The web app does not (this is standard with web apps that they must be connected to the internet).
- **Professional Voice Over**  
Tour Buddy can provide voice over samples to client and arrange recording and input into the App Builder.

Tour Buddy Apps offers a flexible and user friendly platform that will allow the City to make changes to the App as it is built and they can even make changes in years to come at no additional charge. One thing not mentioned in your RFP is that your city will need to open its own Apple and Google developer accounts in order to launch the mobile app. The cost will be in the pricing section (all fees are paid directly to Apple and Google) but it is important that your organization is aware of this process. Tour Buddy has step by step instructions on how to set it up and we can guide you through the entire process. Tour Buddy's Apps are designed so that

they all come from the same code base therefore, the functionality of the app can not be changed. The user can change the color and content, but the overall functionality is not customizable.

## Tour Buddy Apps Case Studies and Qualifications:

### City of Garland Texas:

The City of Garland Texas wanted to show its diverse and engaging history with a mobile app that allowed them to create multiple tours. The city created the Experience Historic Garland App using the App Builder Website and have included more than 3 different tours in the app. They continue to add tours and make tweaks.

Read more: <https://www.tourappbuilder.com/historic-walking-tour-app-garland-texas/>

Download on iOS: <https://itunes.apple.com/us/app/experience-historic-garland/id1296911495?ls=1&mt=8>

Download on Android: <https://play.google.com/store/apps/details?id=com.tb.tb760>

Point of Contact: Omar Rodriguez RodriguezO@garlandtx.gov

### City of Quincy Florida:

Quincy Main Street's vision to revitalize and preserve the rich and diverse culture in Quincy, Florida informed their mobile app tour and website tour project. With funding from the Florida Department of State, Division of Historical Resources the Historic Quincy Walking Tour App were created using the App Builder Website. Tour Buddy helped Quincy Main Street record their voice over artists and launch their app over the period of 6 weeks.

Read more:

Download on iOS: <https://itunes.apple.com/us/app/historic-quincy-walking-tour/id1387599037?ls=1&mt=8>

Download on Android:

<https://play.google.com/store/apps/details?id=org.quincymainstreet.tour1038>

Website Tour: <https://d13i5ks0r2zvxy.cloudfront.net/index.html?id=1038>

Point of Contact: Dawn McMillan dawnmcmi@icloud.com

## About Tour Buddy

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Tour Buddy is a multimedia mobile app development and Software Company that specializes in audio tour apps. We have been creating digital audio tours and innovative ways to distribute them since 2008.

Our popular App Builder platform offers a cost effective off-the-shelf App product that allows clients to create their own iPhone and Android apps for audio tours or city/museum/festival guide through an easy-to-use web interface. App features include custom branding, stop images, audio, gps maps, custom image map, website and video links and more. For a list of apps created using the App Builder platform visit [www.tourappbuilder.com/products](http://www.tourappbuilder.com/products) .

### Professional Resumes:

See the attached resumes of our team

Sarah Pounders – CEO

Lydia Ireland – Account Manager/Billing

Yvonne Jouffrault – Head of Product

Brian Criscuolo – CTO



**Implementation Process with Milestones:**

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**Milestone #1 – August 26th**

Tour Buddy submits complete RFP

**Milestone #2 – September 30th**

Tour Buddy confirms scope and process with HPF Grant Manager and makes any changes.

**Milestone #3 – October 15th**

Public meeting – Tour Buddy not involved.

**Milestone #4 – November 15th**

Documentation of meeting – Tour Buddy not involved.

**Milestone #5 – March 16th 2020**

Tour Buddy receives content for 100 points of interest that include for each stop: 1 GPS points, images, text and links. Tour Buddy inputs the content all at once and then sends a passcode for the City to preview the content. Tour Buddy will then make all changes at one time to the app. At this time the City will preview the app's layout and design. The content and app color can be changed but the functionality is not something that can be altered.

Tour Buddy will understand which type of voice the City would like for its tour and send them 3 samples that they can use.

The City will open its Apple and Google developer accounts and add the Tour Buddy team as admins.

**Milestone #6 – April 15<sup>th</sup>**

Tour Buddy submits a sample of the audio file created by the voice over artist of choice for approval.

**Milestone #7 – May 29<sup>th</sup>**

The City continues to preview the app and make any changes. The City must deliver its branding and graphics that will be used in the app. All audio files are complete and uploaded to the app.

**Milestone #8 – July 31<sup>st</sup>**

Mobile app is live on the App Store and Google Play and website is live.

**Milestone #9 – August 31<sup>st</sup>**

App and website are live.

**Mobile App Pricing**

<u>Mobile App (iOS and Android) Setup Fee</u> <ul style="list-style-type: none"> <li>1 iOS and 1 Android App</li> </ul>	<b>\$2,500</b>
<u>Annual Fee</u> <ul style="list-style-type: none"> <li>Hosting for media in app.</li> <li>Unlimited and real time content updates through the App Builder Website</li> <li>IOS and Android software updates as needed</li> <li>Ongoing support for the App Builder Website</li> </ul>	<b>\$1,000</b>
<b>Total App Cost</b>	<b>\$3,500</b>
<u>Website Set Up &amp; Annual Fee</u> <ul style="list-style-type: none"> <li>Create website with content from App Builder Website</li> <li>Host website</li> </ul>	<b>\$1000</b>

**Tour Buddy Services Pricing**

<u>Content Input</u> <ul style="list-style-type: none"> <li>✓ Tour Buddy will input 100 points of interest of content. Each point of interest will include images, a GPS point, text, a stop title and audio file (optional)</li> <li>✓ After input is complete, Tour Buddy will make edits according to a list of changes provided by the city.</li> </ul>	<b>\$600</b>
<u>Audio Production**</u> Audio Recording will be a professional voice over artist and will not include any music or sound effects. Tour Buddy will provide samples. The following quote is for 7,000 words broken up into 30 audio files.	<b>\$1,500</b>

Tour Buddy Apps Proposal  
August 14, 2017

<b>Year 1 Project Total:</b>	<b>\$6,600*</b>
<b>Annual Fees:</b>	<b>\$2,000***</b>

**Payment Details\***

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\*\*All rights to the audio recording will be transferred to City of Moberly. The app builder service is subject to the terms listed at <http://www.tourappbuilder.com/tos/>

\*\*\*Annual Fees: To be paid on the anniversary of the release of the Apps starting 12 months after the App Release date. The services will continue for as long as the Client continues to pay the annual fee. The Client may cancel at any time but will not be refunded any partial years' fees.

**Additional Fees not paid to Tour Buddy Apps**

*Yearly Fee for Apple Developer Account: \$300*

*Yearly Fee for Google Developer Account: \$25*

## Yvonne Jouffrault

Former institutional investment professional turned tech entrepreneur and product nerd. I have been involved in the creation of dozens of startups and new products as a founder, advisor, consultant and investor. My strengths are in product design/development and go-to-market and growth strategies.

As the founder of Tour Buddy Apps, I bootstrapped and built a mobile app publishing platform for historic and cultural destinations into a profitable and sustainable company. Tour Buddy is a market leader for digital audio walking and driving tours. We have created a \*mostly\* automated lead generation, digital signup and publishing platform that allows us to focus on improving workflow and user experience. I still work with the team as a strategic advisor and oversee product positioning and strategy but spend most of my time working with (or for) other startups as an EIR

I am also a passionate community builder and spent the last 10 years growing the tech and startup community in Savannah. I helped build and run numerous organizations and events which brought together and showcased the budding Savannah tech scene and companies. I was also involved in building numerous outreach programs into education to engage students and educators in tech and innovative thinking.

### Experience:

Head of Product Marketing - Company Name - Zenaton

Dates Employed May 2019 – Present

Strategic Advisor - Company Name - Tour Buddy Apps

Dates Employed Oct 2018 – Present

Advisor - Company Name - CrowdFlik®

Dates Employed Dec 2015 – Present

Chief Operating Officer - Company Name - LiveMon

Dates Employed Nov 2018 – Feb 2019

Location Paris Area, France

Company Name -Tour Buddy Apps

- Title Head of Product  
Dates Employed 2016 – 2018
- Title Founder & CEO  
Dates Employed 2009 – 2016

Company Name ATDC

- Title Entrepreneur in Residence  
Dates Employed Oct 2015 – May 2017
- Title Program Manager, Savannah Startup Bootcamp  
Dates Employed Oct 2015 – Apr 2017

Interim CEO - Company Name - PinscoutDates Employed May 2016 – Nov 2016Vice President of Acquisitions & Development - Company Name - JamestownDates Employed 2005 – 2007Acquisitions Associate - Company Name - AMB Property CorporationDates Employed 2001 – 2005



Brian Criscuolo

I am a professional software engineer focused on providing solid solutions to mobile device platforms using innovative tools, techniques and years of experience. Special interests include software engineering leadership and the performance and potential of distributed teams. My specialization is in the creation and delivery of interesting and refined applications for the iOS platform and leading teams of client, server, API and SDK talents to success.

Skills:

iOS development, deployment and architecture, Cocoa, Web and Server API expertise. Location services, Bluetooth beacons and mapping. Creation and usage of SDKs built for public and private consumption. Data exchange, transformation and synchronization. Project leadership, mentoring and execution. Client interaction, communication, and success.

## Experience

Senior Mobile Engineer / Product Owner, MobilePush SDK - Company Name -Salesforce

Dates Employed May 2016 – Present

iOS Software Engineer, Principal Developer and Consultant - Company Name -warmwinds software

Dates Employed Jul 2003 – Present

Technical Co-founder and iOS Software Engineer - Company Name - Tour Buddy Apps

Dates Employed May 2013 – Present

Member of Technical Staff / iOS Software Engineer - Company Name - Magento Commerce, eBay Enterprise, eBay, Inc.

Dates Employed Mar 2012 – Apr 2016

294 Shasta Drive  
Pittsburgh, PA 15239  
(412) 956-7127

email: lydiafireland@yahoo.com

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## LYDIA F. IRELAND

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**Experience**    **Tour Buddy Apps, Savannah GA**    Aug 2013 – Present

*Executive Assistant & Account Manager*

Work directly with the owner & CEO in all departments to grow mobile app tour platform.

- Educate clients to realize full functionality of iOS and Android app.
- Maintain customer relationships and train clients to configure app to meet their needs.
- Configure app with customer data and specifications, including coordinating translations services to make multiple language versions.
- Visit client sites to provide technical support, training and consultation for GPS app.
- Provide onboarding to clients through e-mails, blog posts and wikis.
- Support clients with troubleshooting on the iOS App and Android app.
- Document development issues on GitHub for the mobile app.
- Conducted Q A testing on iOS and Android apps.
- Manage social media calendar, create blog posts on word press, schedule marketing meetings and social media posts.
- Use QuickBooks to manage A/P, A/R, and all financial data.

**Dapel Jewelers., Monroeville, PA**

*Executive Assistant*

Nov 2006 – Present

Work directly with the owner to provide all administrative support and book keeping needs.

- Use QuickBooks to manage A/P, A/R, and all financial data.
- Manage full diamond/jewelry inventory system and prepare jewelry appraisals.
- Handle special high value customer orders within tight deadlines.

**TRC Industries Inc., Wilmerding, PA**

*Office Manager*

April 1999 – Dec 2006

Work directly with the VP&GM and Corporate Controller providing support in all areas and responsible for A/R, A/P, HR tasks, health benefits, and worker's compensation.

- Administer all invoicing, A/R, A/P duties including legal action for collections.
- Manage the DOT required forms, files, and logs. Complete all monthly, quarterly, and yearly IFTA and state taxes.
- Interface with insurance companies and employees regarding workmen's compensation claims by gathering and documenting information and carrying out necessary procedures.
- Research all unemployment claims and attend unemployment hearings.
- Manage short and long-term disability claims as well as FMLA paperwork.
- Maintain files on workplace injury/illness claims and OSHA-required records of workplace illness and injury, and disseminate information to employees.
- Assist vice president in implementing ISO-9001. Serve as internal auditor for ISO-9001 procedures, being responsible for Document and Data Control and Quality Records.
- Coordinate hiring process providing information to applicants regarding the hiring process, employment policies, company information, and requirements.

**Software:** Proficient in Microsoft Office, Google Drive, Dropbox, Snag-it, Canva, GitHub, Social Media, Wordpress, iOS, Android and QuickBooks.

**Education**    B.S. Business Management    December 2006  
Indiana University of Pennsylvania, Indiana, PA

# **Sarah POUNDERS**

---

## **Professional Experience**

02/2015-Present    **Tour Buddy Apps**  
*CEO*

- Primary liaison for prospective and existing clients.
- Visited sites to provide technical support, training and consultation for GPS App.
- Provided onboarding to clients through e-mails, blog posts and wikis.
- Configured web application and performed online and in person demos.
- Trained clients to configure app to meet their needs.
- Educated clients to realize full functionality of iOS and Android app.
- Supported clients with troubleshooting on the web application, iOS App and Android App.
- Documented development issues on GitHub for the web application and mobile app.
- Tested functionality and design of iOS and Android App.
- Created blog posts and promo videos to execute our digital marketing plan on social media.

01/2011-01/2014    **VLN Partners, Pittsburgh PA**  
*Adjunct Cyber English Teacher*

Provided online formative and summative feedback to students according to the Pennsylvania standards.

07/2007-06/2010    **Dekalb PATH Academy, Dekalb County Public School**  
*7<sup>th</sup> Grade Language Arts Teacher/Soccer Coach*

Worked with learners from diverse backgrounds to embrace reading and writing as tools for success.

## **Education**

**M.A. Education**, Georgia State University,

August 2007

**B.A. English**, Georgia State University,

December 2005





# MAPNTOUR

**RFP**

## **CITY OF MOBERLY Historic Walking Tour**

2857 E Miller Rd  
Midland, MI 48640  
989-493-5147  
denny@mapntour.com  
www.mapntour.com

July 24, 2019

WS #8.

D. Kay Galloway  
City Clerk  
City of Moberly  
101 W Reed Street  
Moberly, MO 65270

Dear Kay,

Thank you for the opportunity to submit a proposal for the **Moberly Historic Walking Tour** project. We see this as an exciting opportunity to help you achieve your goals of promoting unique aspects of the city, attracting people to your downtown, and engaging the younger generation in historic preservation. We are confident that we can deliver a state-of-the-art interpretive web and mobile app for this purpose. This proposal is based upon our vision considering the level of detail provided in the Request for Proposal.

**Map-N-Tour is your ideal partner because**

- ▶ Our platforms and their interpretive capacity are ideally suited to the goals of this project.
- ▶ Our 3D maps provide a competitive advantage showing higher than average engagement times
- ▶ Our project team has extensive experience that can guide your project to a successful launch.
- ▶ Map-N-Tour applications and client projects have been awarded state, regional, and international awards.

Thank you for considering our offer and we look forward to the opportunity to demonstrate our capabilities to you.

Kind regards,



Denice M. Henson, President

2857 E Miller Rd  
Midland, MI 48640  
989-493-5147 (Eastern)  
denny@mapntour.com  
www.mapntour.com



REQUEST FOR QUALIFICATION  
TO PROVIDE APPLICATION DEVELOPMENT  
DECLARATION OF SUBMITTER

Ladies and Gentlemen:

In response to your invitation, the undersigned, as Submitter, hereby declares that the qualifications presented are made in good faith without fraud or collusion with any other parties submitting qualifications, and that the Submitter has had the opportunity to ask questions and receive clarifications regarding the request for qualifications prior to submission date.

In submitting qualifications, it is understood the CITY reserves the right to accept or reject any or all qualifications submitted, to waive irregularities and/or formalities and in general to make award in any manner deemed by it, in its sole discretion, to be in the best interests of the CITY. The CITY assumes no liability for the cost incurred of submitting qualifications.

By signing below you confirm that you are authorized by your firm to sign all future documents related to this project on behalf of your firm.

Denice M. Henson

Signature

Denice M. Henson, President

Name and Title (Please print or type)

Map-N-Tour, Inc.

Name of Firm

July 24, 2019

Date

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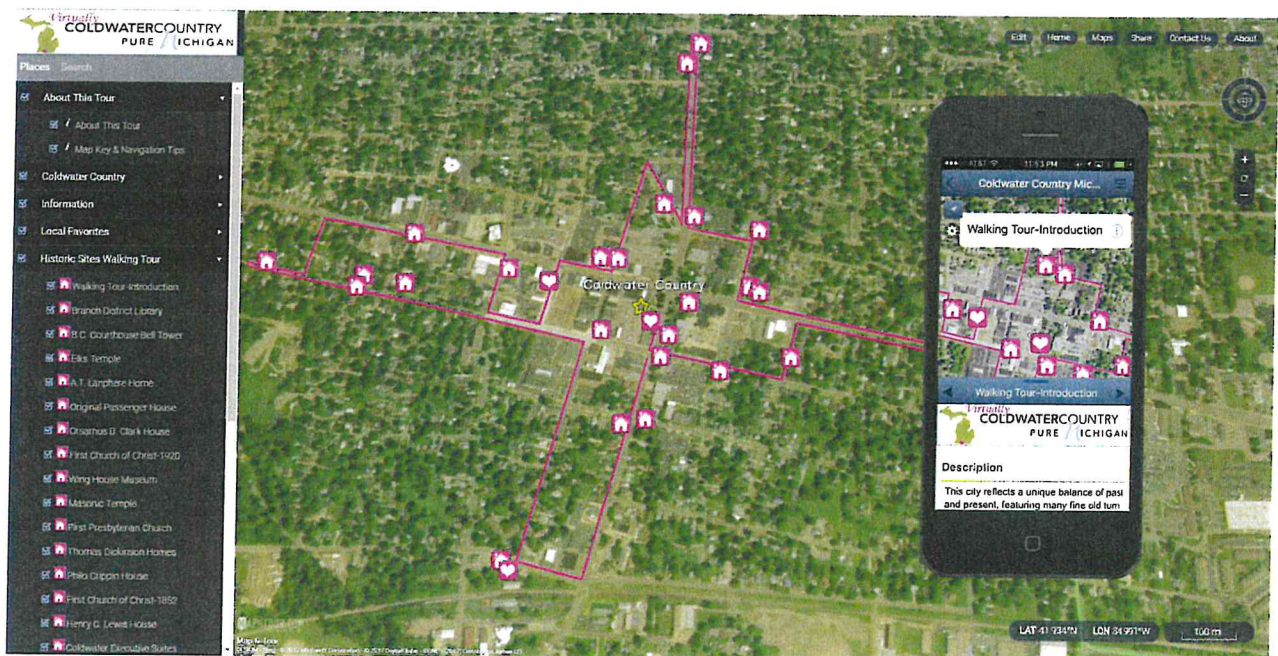
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The City of Moberly wants to leverage the benefits of digital marketing platforms to promote historic and other unique assets of their community. As a collaborative marketing effort this project will provide a community-wide resource to promote historic preservation, tourism, and outdoor recreation. It can also be used for talent and business attraction efforts. The particular focus on a historic walking tour component will help showcase Moberly's historic buildings. Creating this type of visitor "experience" can bring people to the downtown district where they can have a positive impact on the local economy.

The historic walking tour will share interesting and historically accurate information about the featured structures. Utilizing the content provided by historians, the app will combine traditional and new media to attract visitors, and enrich the visitor experience. The goal is to increase universal access in the form of a self-guided tour and interest younger people in historic preservation.

Aspects of the web and mobile applications outlined in this proposal are designed to demonstrate the benefits that come from marketing historic venues with interactive digital tools. Historic maps can overlay satellite images on the app, 3D models may help people visualize structures that are no longer standing. GPS location beacons make it easy for visitors to know they are standing in historic locations. The option to utilize fly-through narrated tours of specific stops on the tour can provide marketing videos useful for educational purposes and social media channels. Fly-through tour experiences are easy to create and integrate.

The proposed digital platform provides short and long-term value as content can easily be increased and modified as desired. Co-marketing opportunities will expand the reach and access. Revenue generation opportunities are an additional benefit of this proposal. The project offers the option to acquire funding sponsors or advertising revenue from local businesses.





We help you succeed because we promote simple solutions which enhance the digital experience that are easy to create and integrate.

## Moberly Historic Walking Tour

### Project Scope & Deliverable Summary

Web Platform & Mobile App - (Android & IOS)
Graphics - Bubble Header, 10 icons, Website Integration Graphic
100 Map Pins
Premium Media Options
Copywriting for Map Pins (not done by Historian)
30 Audio Files - of Historian's Narratives
Image Management - for client's existing images
4 Paths
4 Photos Overlays
2 Map overlays
1 3D Model - medium complexity
Project Management
Marketing Consultation
Training

### Deliverable Definitions

Map Pin: A Point of Interest featured on the map
Icon: Small graphic placed on the map to represent and identify a Point of Interest
Information Bubble: Map Pin Popup that contains information and media about the Point of Interest
Bubble Header: Branding Banner that displays at the top of each information bubble
Path Feature: A Virtual Path on the map indicating a route or trail
Photo Overlay: A photo placed directly on the map
Map Overlay: Map or diagram overlaid on the satellite image
3D Model: A virtual model of a building or object that is placed on the 3D map

# Qualifications

We believe in the potential of online technologies to continue to change our world. We want to make sure it changes for the better—better business, better engagement, and better lives—so we create web and mobile applications that improve the digital experience.

We're proud to have a team that empowers us to deliver multifaceted projects. What they do matters to them, and that will matter to you. Founded in 2012, we are a privately-owned digital application marketing firm, headquartered in Midland MI, and serve a variety of companies and nonprofit organizations nationwide.

The tools we create are not restricted by traditional marketing boundaries or national borders, so why should our business be? You will be in good company should you choose to work with Map-N-Tour. Our clients' projects have won regional, state, and international awards.

### We feature

- ▶ Interpretive capabilities designed for historic preservation
- ▶ Interactive 3-D maps, 3D Models, Augmented Reality
- ▶ Overlays to show past present & future
- ▶ Fly-through narrated tour capabilities ([www.youtube.com/watch?v=zFpA\\_NK63vo](http://www.youtube.com/watch?v=zFpA_NK63vo))







**Denny Henson**  
**President/Co-Founder**  
**Map-N-Tour**

Denny Henson has 20 years' experience in management, project management, and online databases. She enjoys using technology to create solutions that enrich people's lives. Some of her achievements include developing a new data collection process for certificate of need applications for high end medical equipment, managing an on-site production facility for Dow Chemical's litigation databases, and serving as the field operations manager for a non-profit event that spanned 8 states in 7 months bringing the project in under budget. Map-N-Tour is realizing her dreams of sharing stories. Each place and its people are special to those who learn about them.



**Shawn Foltz**  
**COO, Map-N-Tour**

Shawn is a seasoned executive and operational leader. He has expertise in design and delivery of cost-effective, high-performance operational solutions. He is skilled in all phases of product life cycle, from initial feasibility analysis & conceptual design through implementation and enhancement.

Being customer-centric with the ability to initiate profitable alliances with global vendors and suppliers his career has included such positions as Executive Director/COO, VP of Operations, Managing Director (Australia) and Senior Product Manager.



**Greg Boss**  
**Technology Consultant**

With over 500 issued US patents, Greg is the 69th most prolific inventor in world history. ([bit.ly/1cRy85u](http://bit.ly/1cRy85u)). He is a Senior Principal Engineer and Master Inventor in the health and services industry with deep experience in mobile, cloud, IoT, blockchain, and artificial intelligence. Greg has over 600 submitted patents (issued + pending) in almost every technology field and has recently joined Optum Technologies Sr Management team. Greg's accomplishments include designing and deploying a Client Innovation Center in Austin which showcased IBM Mobility Service offerings using cutting edge technology including IoT, presence tracking, advanced analytics, and telepresence in medical, retail, banking and other verticals. He has been a contributor in the architecture of many of IBM's worldwide cloud offerings and products. Greg was responsible for leading the CIO Technology Lab in deploying dozens of advanced technology pilots worldwide.



**Karl Kohlbrand**  
**Lead Developer, Map-N-Tour**

Karl has 15 years of development experience with everything from data manipulation and visualization through full desktop and web application development and design. Karl has worked in and continues to build expertise in C, C++, Obj C, C#, Java, MySQL 3.2 - 5.6, Microsoft SQL Server 2000 - 2012, Sybase 7 - 16, HTML, CSS, Javascript, XML, KML and PHP. He has experience with infrastructure virtualization and migration projects to improve and streamline processes for hospitals, hospital groups, and imaging centers. Karl manages and maintains the server architectures with a focus toward continual improvement and optimization of the system as well as making sure we are prepared for what is new and coming up. Karl is also our database architect. He is continually monitoring how the system is used so he can improve the database design and look for new ways to store the data to give our customers the best experience possible.



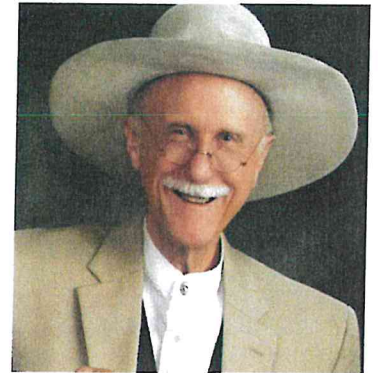
**Rutaraj Desai**  
**Mobile Developer**

Rutaraj has five years experience in software development. He has a bachelor's degree in computer science and has working experience on Web and Mobile platforms. He has worked on JAVA, Objective-C, Swift, GO-Lang, React JS, Ruby On Rails, C#, .Net. and has created microservices architecture for larger application for easy maintenance and continuous improvement. Rutaraj continues his work on different mobile and web solutions to provide a great experience to all clients.



**Tonia Lewis**  
**Graphic Design**

Tonia has over 20 years of experience in graphic design, website design, website management, search engine optimization, social media, and email marketing. Tonia works closely with businesses to align marketing with the business' mission statement and goals into coordinated campaigns that increase brand awareness, revenue, and return on investment with a focus on the tourism industry.



**Clive Romney**  
**Performer & Producer**

Clive Romney is a passionate storyteller, producer, composer and performer. He has narrated two documentary films, "Great Salt Lake: Utah's Sanctuary" for BYUtv, and "The Jonathan Heaton Story" for Judd Films. Clive has more than 4,800 performances to his credit—solo and with ensembles.

Clive is the Executive Director of Utah Pioneer Heritage Arts ([www.upharts.org](http://www.upharts.org)), and serves on the board of directors of the Utah Arts Council representing the folk arts, and on the Digital Media Advisory Board for Utah Valley University.



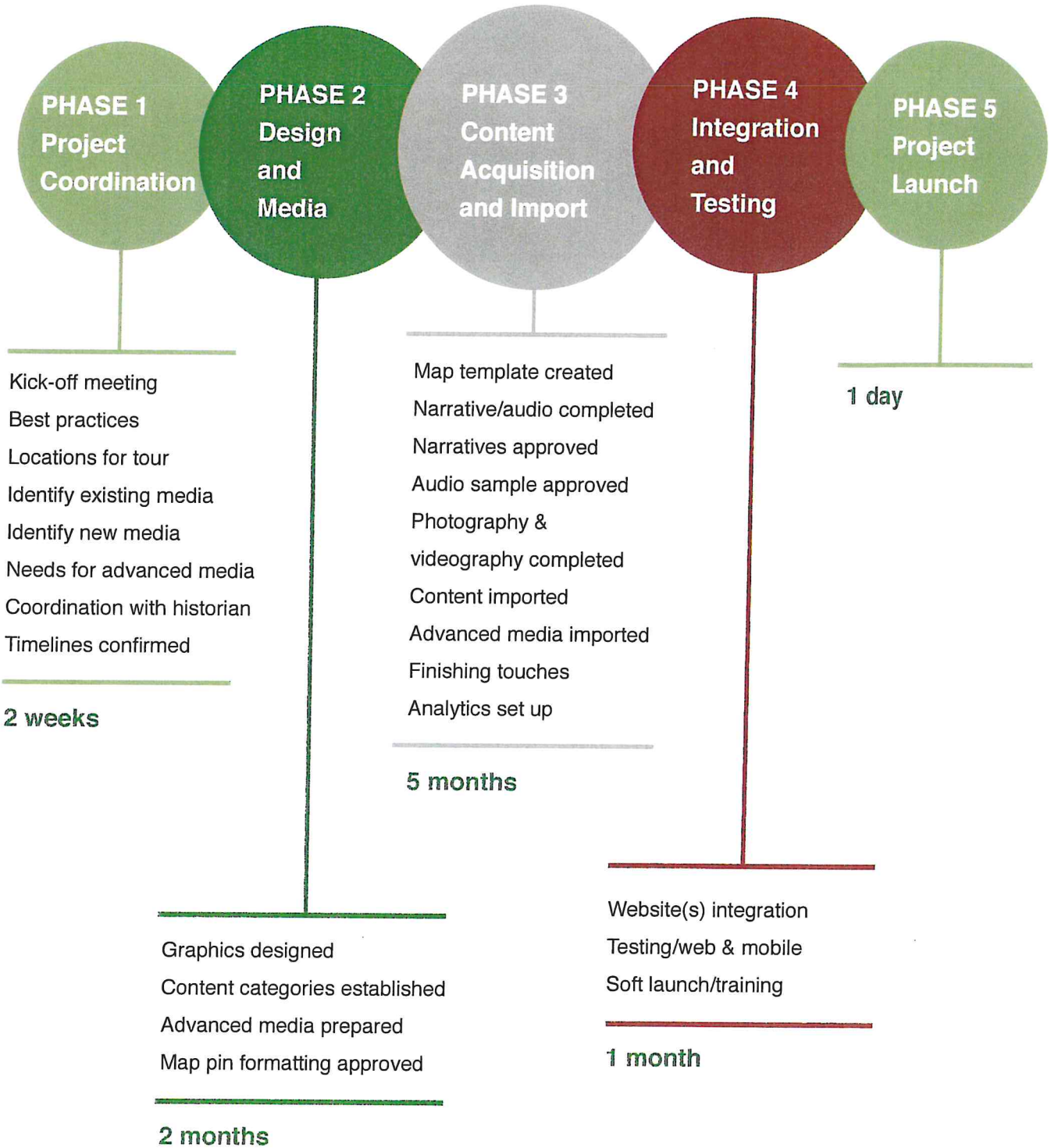
# Why us?

## Map-N-Tour brings unique qualifications and benefits to the Moberly Historic Walking Tour Project

- Suitability** This proposed application is ideally suited to the project purpose stated in the RFP and expands upon the original requirement by adding options for additional interpretive features.
- Capability** The company and project team have proven their ability to deliver web and mobile solutions for customers nationwide.
- Flexibility** This website proposal offers a flexible solution in that the virtual tour component can be utilized for a variety of purposes to promote historic and modern attractions.
- Quality User Experience**
  1. Cross platform access and seamless user experience through an information rich application
  2. Interactive content – engages the visitor
- Scalability** Ability to add to the initial project, to include more content, new locations, community components, seasonal tours, and trail related events.
- Affordability** Cost and time savings by leveraging ready-made application, real-time updates, reduced printing costs, greater outreach.
- Opportunity** Opportunities to fund project long term through sponsorships, community support, and business advertising.



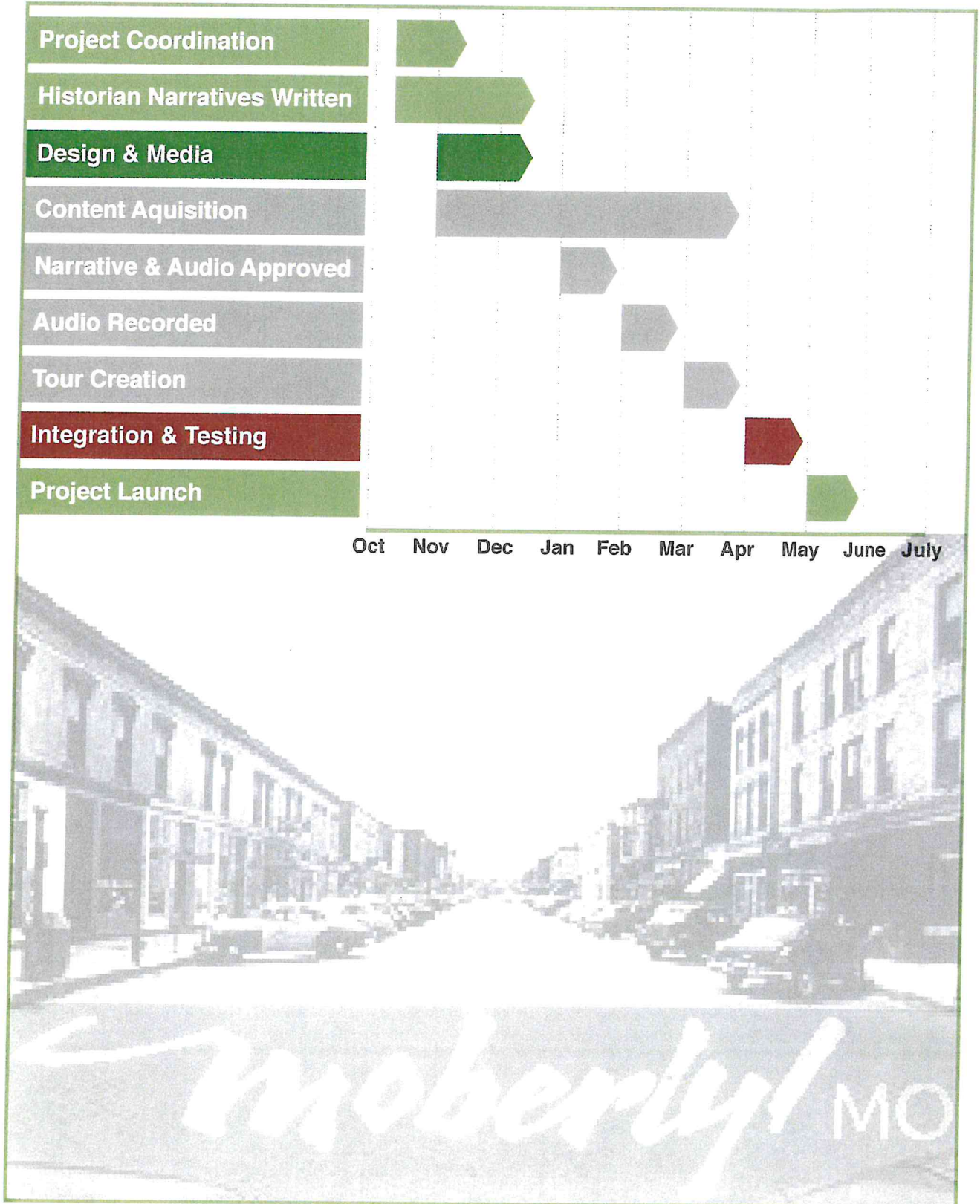
# Project Phases





# Project Timeline

WS #8.



# Project Investment

WS #8.

## City of Moberly - Project Investment

<b>Applications &amp; Content Set up - (OneTime Implementation)</b>	\$	18,800
<b>Annual Subscription Fee - Map-N-Tour Manages Content &amp; Apps</b>	\$	6,200
<b>TOTAL INVESTMENT</b>		<b>\$ 25,000</b>

**Additional Project Management & Services \$100/hr**

**Payment Terms**

50% of Project Total - to start

25% Benchmark 1 met - January 2020

25% App Launched - May 2020

Subscription due launch month each year

Project Services	
Project Management	12 hrs
Content Copywriting	12 hrs
Audio Narration Production (1Gig = 100 Words Maximum)	30 Gigs
Education & Training	2 hrs

## Subscription Services



**Hosting and Updates**

Our Servers Host Web & Mobile

We Manage Web Updates

Analytics

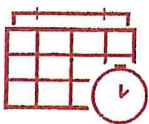


**Mobile App Management**

Life Cycle Mobile App Management

Android Updates

Apple Updates



**Post Launch**

Content Updates by Map-N-Tour: 5 hours/yr

Additional Services & Project Management: \$100/hr

60 day warrantee past launch

Customer Service 3 hours/Year included

## Project Assumptions

1. Client will provide a primary contact person for communication between the company and Map-N-Tour.
2. Client will provide any requested graphical assets (i.e. logo, industry photos, current collateral, text for updates, images, etc.) to Map-N-Tour and its sub-contractors in an electronic format to be used in the project as needed.
3. Any costs for third party assets / systems (i.e. stock photography, CMS, CRM) will be paid by the client.
4. A change control process will be used for any requests or hours that are not part of the original Scope of Services.
5. Client will identify locations and provide list to Map-N-Tour.
6. All copyright laws will be followed for content used in this project.
7. Client retains full copyright to all uploaded information to Map-N-Tour applications, but grants unlimited, non-exclusive, non-transferable rights to Map-N-Tour to use or reproduce to promote any of Map-N-Tour's applications.
8. Training & marketing consultations will be done by web meetings unless otherwise agreed upon.
9. No custom development items have been requested for this proposal.
10. All audio and recording of narrations will be done by Map-N-Tour by a professional narrator.
11. Twelve copy writing hours for modern location descriptions are included.
12. Copy writing for historic buildings will be created by an approved historian selected by the client.
13. Map-N-Tour will prepare all content for import from media and images shared by client.
14. Premium media options are part of this package (see Appendix).
15. Package price based on trails average length - 20 miles.
16. Map Pins, descriptions, & media will be imported programmatically



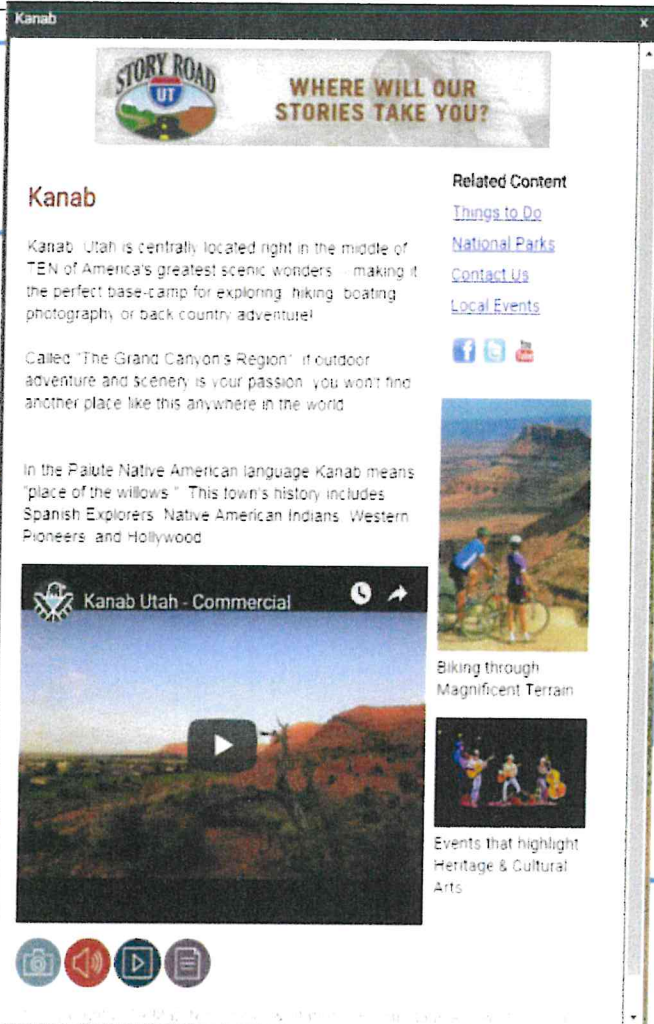
**Premium & Advanced Media Options In This Proposal**

Address & Phone	Y
Website Links	Y
Social Media Links	Y
Text	100 Words
Photos	2
YouTube Video link	3
PDF	3
Audio Narration (Maximum 100 words)	30
Path/Trail/Route Capability	4
Map Overlay Capability	2
Photo Overlay Capability	4
3D Model - moderate complexity	1
Notification Image - for Notifications	1
Option to Add Guided Fly-through Tour	Y
Updates to Tour Content	Y
<i>(1) Five Hours per year text &amp; media edits</i>	

**Other Advanced Media & Feature Capabilities**

(Boundaries) Polygon Capability	By Quote
360 Panoramas	By Quote
iFrame Website Embedding inside Map Pin Bubbles	By Quote
Google Forms inside Map Pin Bubbles	By Quote
Custom Video 3-5 min	By Quote
3D Model Created & Rendered in Project for Web & Mobile	By Quote
30 second Audio Narration with Music Underscore	By Quote
Narrated Fly-through Tour Video	By Quote

## Bubble Template with all media options

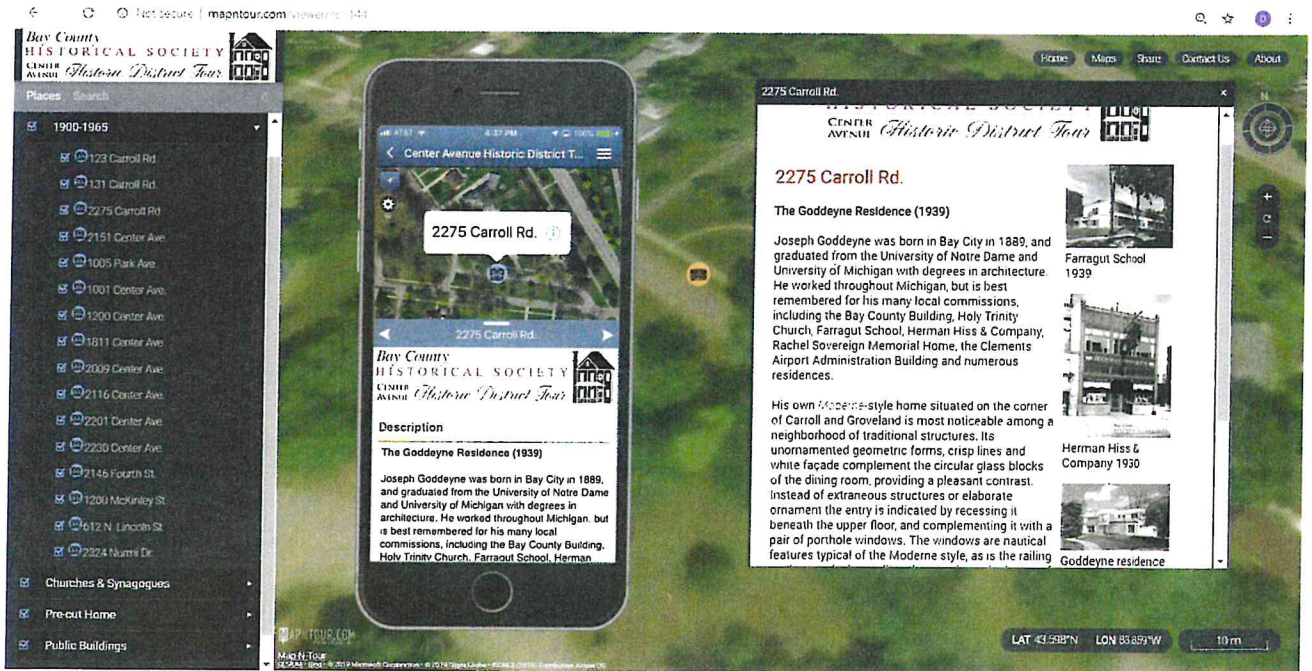
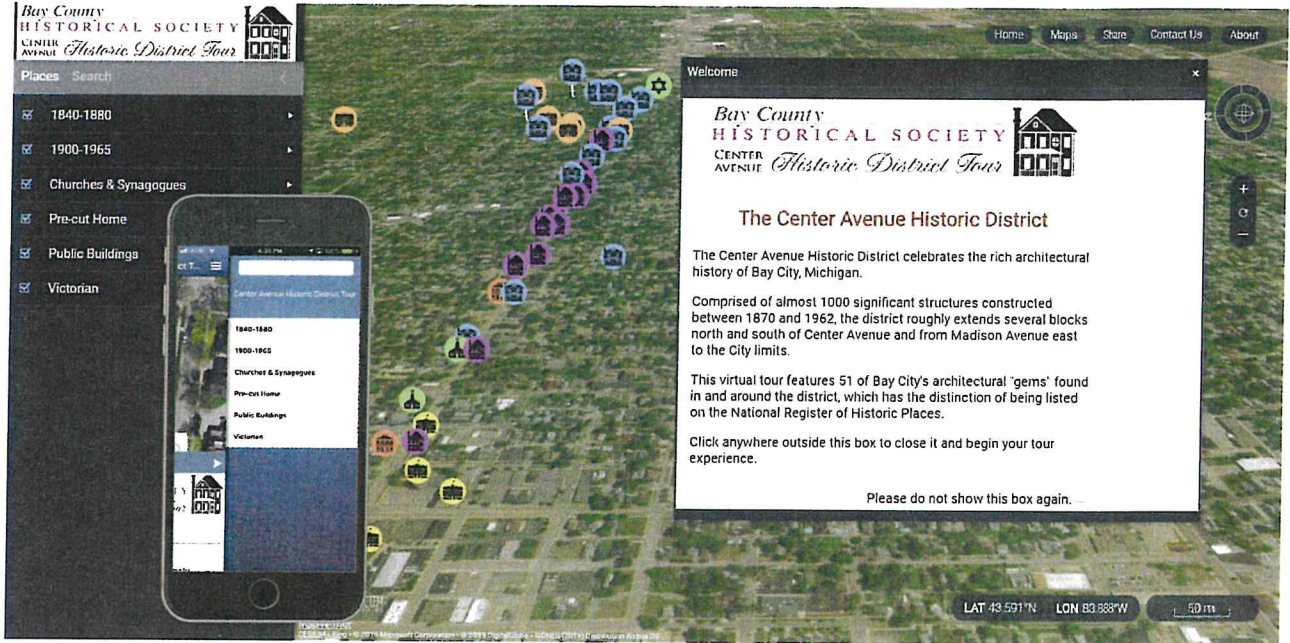
<p><b>Header</b> (aka "Default Header Image") Your custom header appears at the top of all Placemark bubbles</p> <p><b>Title</b> You provide a Title for each Placemark</p> <ul style="list-style-type: none"><li>• Event</li><li>• Location</li><li>• Date</li></ul> <p><b>Description</b> Text format options:</p> <ul style="list-style-type: none"><li>• Bold</li><li>• Italic</li><li>• Underline</li><li>• Color (option)</li></ul> <p><b>Media Files &amp; .pdf's</b> Icons indicate what kinds of media files are linked to this bubble; music or audio (MP3), text (.pdf), image (JPG), and 360 panoramas</p>		<p><b>Style color</b> Standard background color or custom</p> <p><b>Hyperlinks</b> Link to related "Best of Class" websites</p> <p><b>Thumbnail photos</b> Click to open full resolution image</p> <p><b>Captions</b> Each Thumbnail photo deserves a caption to explain its significance</p> <p><b>Embedded video</b> Short video clips using YouTube (max. 10 Mb.)</p> <p><b>Copyright Notice</b> Each bubble has your copyright attached</p>
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# Supporting Materials

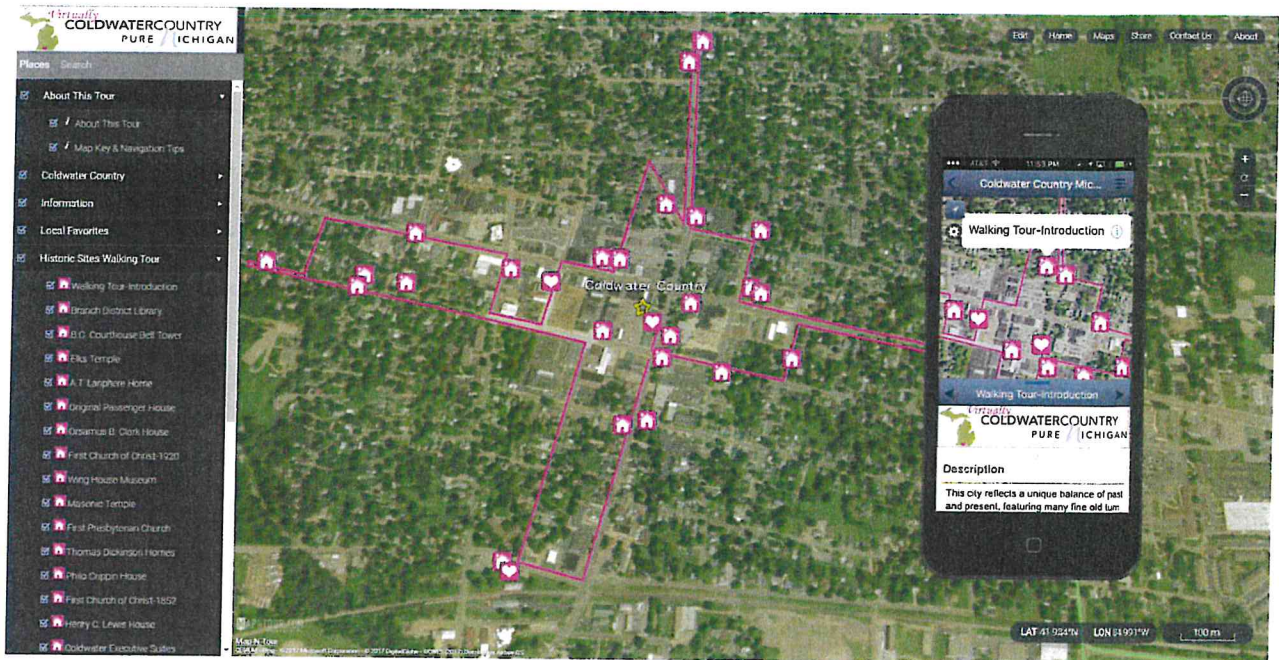
WS #8.

## Historic District Tour

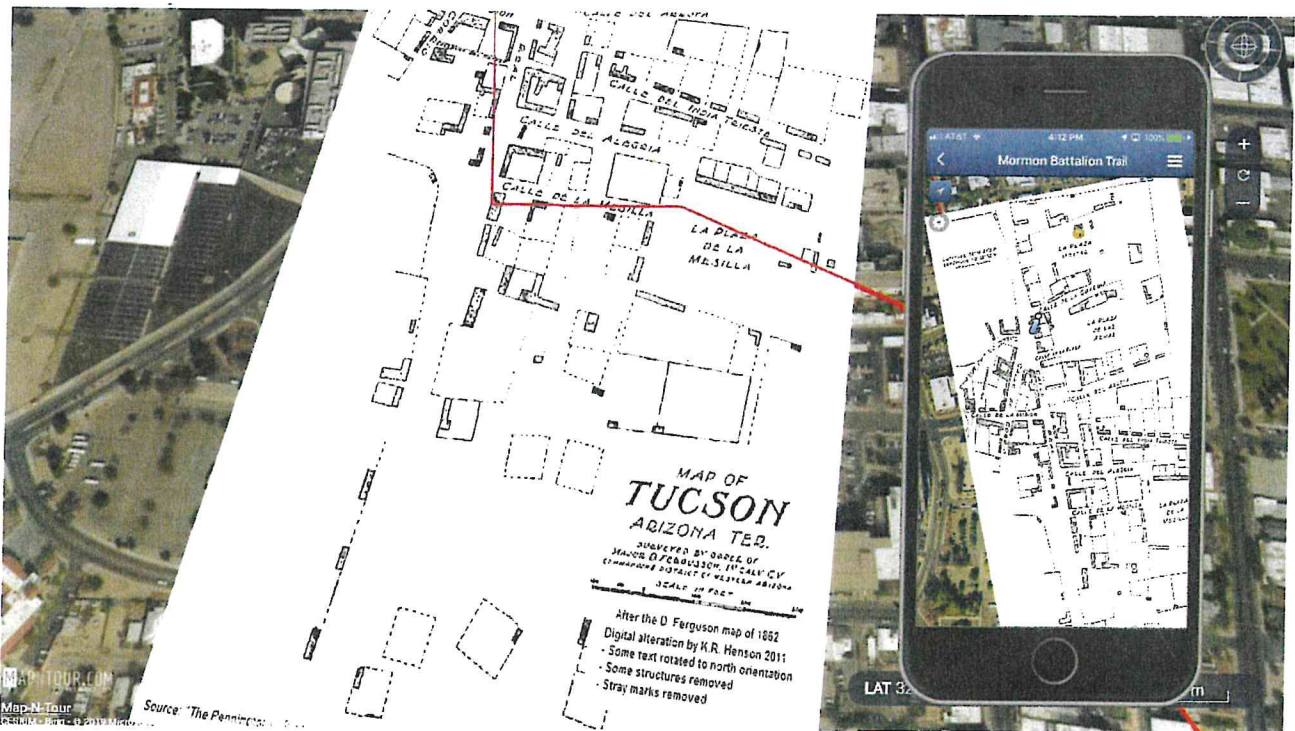




## Paths - Historic Sites Walking Tour

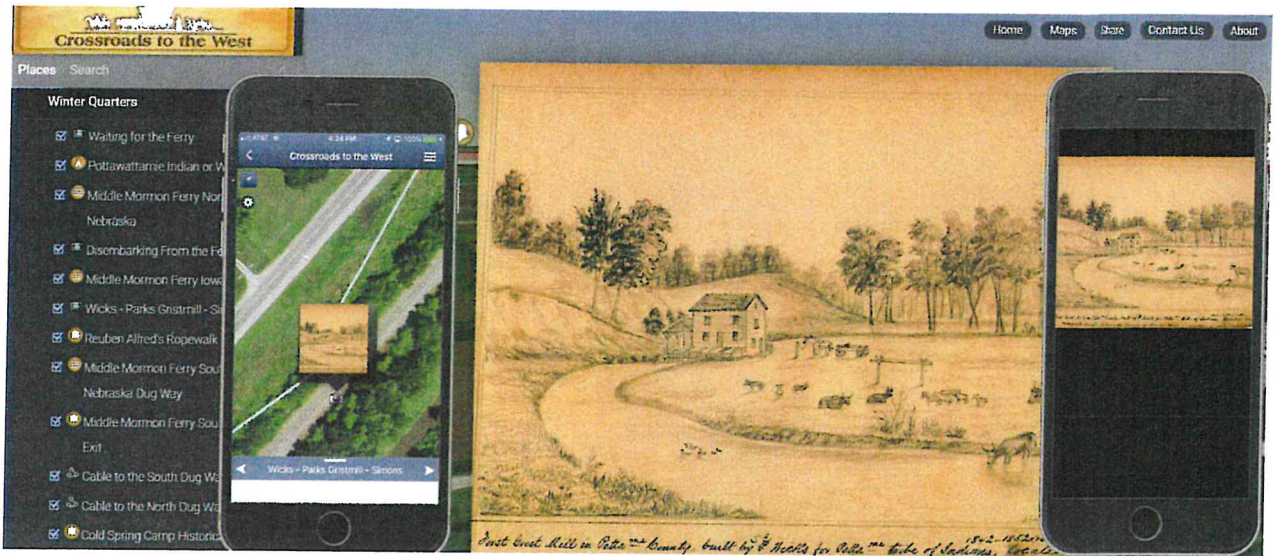


## Map Overlay





## Photo Overlay



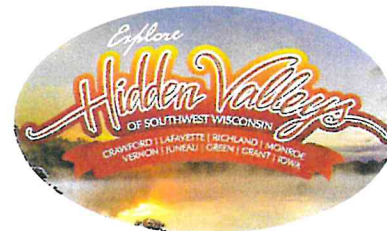
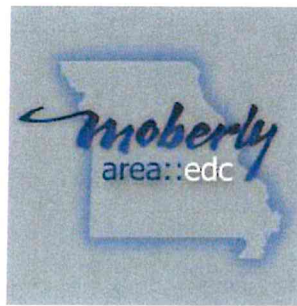
## 3-D Building





# Our Clients

WS #8.



Map-N-Tour not only shows you where you can go – but what kind of experience you'll have when you get there.

—————▶ Jodie Bissonette  
Web Designer  
Gaslight Media-Destination

What a great way to discover history! I watched the Map-N-Tour Panguitch Quilt Walk fly-through video with my family, and was excited to see how it captivated all five of my children, from our 7-year old all the way up to our 18 year-old! The fun song and great storytelling kept the interest of our younger children, while the ability to 'virtually' cross the mountain range intrigued my older children allowing us to better visualize just how far they traveled. To be able to follow the trail that was taken so many years ago really made the story come alive for our family. We liked the different points marked on the trail that showed key points of the journey. The Map-N-Tour app allowed us to discover an amazing event that we otherwise may never have known about. After watching the video, my 12 year old exclaimed, "Can we go there?!?" - followed up by the others echoing her request.

—————▶ Sara Gudmundsen  
Mother of 5, Midland, MI

I would like to tell you a little about my experience with your app while traveling through Southern Utah: The only way I can explain it is that a whole new world opened up to me that I had no idea of before! It was so cool to learn about all the history and town events that happen in that area. Because of utilizing your app I will never see southern Utah the same.

—————▶ Neil Bryce  
Utah

Map-N-Tour is an outstanding digital marketing company that has been a superior partner on delivering great products to our clients. Map-N-Tour is highly responsive, flexible and always creative in seeking solutions that are not only state of the art but exceeds our customer's expectations.

—————▶ Bob Henningsen  
Smart Solutions Group  
DesMoines, IA

A noted historian of the Middle Missouri Valley spent a lifetime researching and documenting its pioneer and Native American history from 1846 - 1854. As Chairman of the Historical Pioneer Research Group finding a way to share this wealth of information in a meaningful way presented a significant challenge. Map-N-Tour was the answer. Their creative team were able to help us integrate print, maps, audio and video in interesting and unique ways to tell a story that had been 50 years in the making!

—————▶ Carl E Scott  
Chairman  
Historical Pioneer Research Group  
Nebraska

I commend Map-N-Tour in their professionalism and timeliness on working with us on our Redwood County project which in itself was developed all virtually. This tool can only improve and expand exposure to a larger audience about Redwood County . . . Rich in Resources, Ready for You!"

—————▶ Julie Rath  
Redwood County, Minnesota



## TravelStorysGPS, LLC Proposal



In Response to the City of Moberly, Missouri, Request for Proposal:  
Historic Walking Tour Narrative Development and Application Development

Submitted to:

Kay Galloway  
City Clerk  
101 West Reed Street  
Moberly, Missouri 65270

Prepared by:

Wells Howe  
Director of Sales  
TravelStorysGPS, LLC  
P.O. Box 494  
Wilson, WY 83014  
Wells@travelstorysgps.com  
(781) 771-9820

A handwritten signature in black ink, appearing to read "Wells Howe". The signature is fluid and cursive, with a long horizontal stroke extending to the right.

August 20, 2019

August 20, 2019

Kay Galloway  
City Clerk  
101 West Reed Street  
Moberly, Missouri 65270

Dear Ms. Galloway,

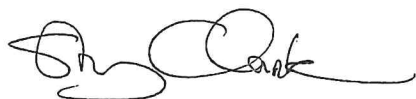
Thank you for the opportunity to compete for the contract to develop a mobile app historic walking tour of Moberly, Missouri. We believe TravelStorysGPS, LLC is the best company in the industry to help your community highlight its fascinating history, attract more visitors, and inspire them to stay longer and spend more money.

TravelStorysGPS has worked with communities, historical societies, museums, agencies, nonprofit institutions, and businesses to develop nearly 130 mobile app audio tours designed to provide location-aware interpretation and stimulate economic development. Our patented and proven TravelStorys™ technology has the distinct ability to reach travelers on the move, hands-free, by automatically presenting local audio stories and wayfinding synchronized to their exact location. Accessible both on-site and remotely, the content enriches experiences, creating lasting memories travelers will share with other potential visitors.

TravelStorys is differentiated by its superlative accessibility and support services. All tours are presented on a single, shared mobile platform, which offers a "one-stop" guide for visitors and facilitates collective promotion by tour sponsors. Many other distinguishing features are described in the attached proposal.

Thank you for your consideration. We look forward to working with the City of Moberly on this exciting project.

Sincerely,



Story Clark  
Founder & CEO  
TravelStorysGPS, LLC  
Story@travelstorysgps.com

## STATEMENT OF UNDERSTANDING

August 20, 2019

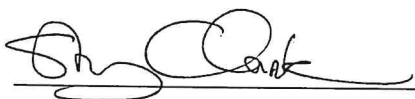
Kay Galloway  
City Clerk  
101 West Reed Street  
Moberly, Missouri 65270

Dear Ms. Galloway,

This letter serves to formally acknowledge that TravelStorysGPS, LLC fully understands the proposed project and the professional services required to complete the project as outlined in the Request for Proposal: Historic Walking Tour Narrative Development and Application Development dated August 8, 2019.

The mission and core services of TravelStorysGPS, LLC are fully aligned with this Request for Proposal, its timeline, and requirements.

TravelStorysGPS, LLC would appreciate the opportunity to perform the services outlined in this Request for Proposal for the City of Moberly and has all the resources and experience to successfully complete the work and provide Moberly with a superior product.



Signature

August 20, 2019

Date

Story Clark,  
Founder & CEO  
TravelStorysGPS, LLC  
[Story@travelstorysGPS.com](mailto:Story@travelstorysGPS.com)

## I. TravelStorysGPS, LLC Qualifications & Experience

TravelStorysGPS, LLC is a Wyoming-based mobile technology company that connects people to places in memorable ways. Our patented, future-forward mobile app, TravelStorys™, reaches travelers on the go, hands-free, with locally sourced, podcast-style audio guides to inspire them with informative and entertaining stories. TravelStorys is synchronized to launch automatically exactly where travelers are, so they can safely explore at their own pace without the distraction of looking at or touching their phones or tablets – eyes on the sights, not on devices.

TravelStorysGPS works with communities, agencies, nonprofit institutions, and businesses, helping them tell their stories of place and attract new audiences. The company goal is to pair the greatest communication tool of our time – the smartphone – with the greatest communication tool of all time – storytelling – to assist our clients in interpreting their communities and landscapes for all smartphone and tablet users, including both visitors and residents.

TravelStorys is also an effective tool for economic development. Our location-aware mobile content enriches travelers' experiences, so they take more time to explore the area, spend more tourism dollars locally, take home memories of where they have been, and encourage their friends and family to visit those same places.

TravelStorysGPS has developed nearly 130 high-quality mobile audio tours in 34 states, with an additional 20 tours scheduled to launch in the coming months. These tours have been downloaded in 99 countries. Our clients include cities and towns, federal, state and local agencies, businesses, friends groups, and other charitable organizations. We assist our tour sponsors in telling their stories – and the stories of the places they promote and sustain – in the most accessible, engaging manner.

The TravelStorysGPS team is highly skilled and experienced in working with tour sponsors to build first-rate tours in downtowns, along highways, trails, bike and boating routes. The team includes app developers, professional storytellers, audio specialists, writers, and marketing professionals.

### A. City of Moberly Historic District Tour Development

The City of Moberly Historic District Tour will be a self-guided audio experience that is free for all users to download and accessible on any smartphone, tablet, or mobile device via the free TravelStorys mobile app platform. As visitors approach sites of interest, audio segments will launch automatically. The tour will highlight the City of Moberly's historic architecture, attract tourism revenue to the local economy, and provide visitors with a



new way to explore the Historic District. Corresponding images, text, and links will provide greater depth to each story site. Images can take users inside the sites “virtually” or present views of historic scenes, events, now-demolished buildings, etc. Users will be able to experience all of the tour content both on-site and remotely for trip planning.

The City of Moberly Historic District Tour will follow a route displayed on a user-friendly, interactive map screen; users can enter the tour at any location with a short orienting audio introduction. They will be able to zoom in and out and see their current position indicated by a blue dot on the map screen, so they can never get lost. The map also includes a compass and an option to select satellite or road view to assist with wayfinding. The tour may also include audio wayfinding to guide users to specific sites.

All TravelStorys tours will include these features:

- **Automatically Launching Audio:** Approximately three minutes of audio per story site that launches automatically as users approach sites of interest without looking at or touching their mobile devices.
- **“Connect” Feature:** A banner with a live link connected to a specific website; can be used to highlight and link to a charitable beneficiary or any other tour-related agency or organization.
- **Useful Nearby Information:** Customized overlays and icons to inform users about nearby sites of interest.
- **Upcoming Nearby Tour Opt-in Notifications (optional app feature that users can select manually):** Inform travelers about tours in their area; tour sponsors can also notify travelers on other TravelStorys tours that their tour is nearby.

Other notable optional features include:

- **Multiple Tracks:** Individual tours can present multiple audio channels, or tracks, customized for different audiences (such as families or foreign language speakers – TravelStorysGPS is currently building tours in Spanish and Mandarin). Users can toggle back and forth between these tracks.
- **Music:** Local music presented between story sites.
- **Polygon Overlays:** Visual overlays to show users tour routes, parking options, city parks, etc.
- **Publisher:** An upcoming web-based tour-production tool that provides tour sponsors with the option of making content and image changes to existing tours.

- **Advertising:** Optional visual and audio advertising placements can generate revenue (see Appendix B).

## B. Content Creation

### CITY OF MOBERLY HISTORIC DISTRICT TOUR FEATURES

**Geotags:** 30 geolocational story sites with audio narration, images, and text

**Map Listings:** 70 additional geolocational sites with images and short informational text

**Mode of Travel:** Walking

**Audio:** 30 authentic, place-based audio stories; maximum 3 minutes per story

**Images:** 3-5 per geotag

**Text:** Audio script for 30 place-based stories viewable in tour, plus informational text for additional 70 map listings

**Custom Mapping:** Colored geotag icons, tour route, and points of interest

The City of Moberly Historic District Tour will entertain and inform users about the historic aspects of the city through a simple, fun, and interactive mobile experience. The City of Moberly will identify 100 historic story sites and, with support and guidance from the TravelStorysGPS production team, design the architecture of the tour, write the informational text for the 70 map listings and the scripts for the 30 audio sites, timed to correspond to the mode of travel (walking), test and market the tour. TravelStorysGPS will provide a selection of professional narrators for the City of Moberly to choose from, then record and edit the narration for the 30 audio sites. All 100 story sites may be altered and updated in real-time to reflect changes in information accuracy, for seasonality, or to promote events and initiatives by the City of Moberly. The 70 geolocational sites will allow for updates to the tour's information without the need to re-record or produce audio.

Audio introductions and conclusions will introduce the City of Moberly as the tour sponsor and offer useful logistical information to the tour user. Contact and social media information for the City of Moberly will also be directly linked within the tour. A charitable organization, such as a community foundation, that is associated with the sites along the



tour route can be designated as the charitable beneficiary for the user-optional donation feature or website link, if desired.

Audio narration scripts for the City of Moberly Historic District Tour will be written by a certified historian designated by the City of Moberly. TravelStorysGPS staff will work closely with the selected historian(s), providing guidance for writing in a narrative style designed specifically for place-based audio. TravelStorysGPS will provide a sample of professional narration to the City of Moberly, then record and edit the narration for the 30 audio sites.

Together, the TravelStorysGPS team, the City of Moberly, and selected historian(s) will build a simple, inspiring, and highly accessible audio experience for Moberly visitors and residents that will highlight the historic resources – both those that are extant and currently represented on-site and those that have been remodeled or demolished – to give a full picture of the city and its history. Audio descriptions, historical storytelling, and images will bring these historic sites to life.

## C. Technology

### 1. The TravelStorys Mobile App

The TravelStorys mobile app is available on iOS and Android devices through the App Store and Google Play. The TravelStorysGPS technology team regularly updates the app to be compatible with new devices and operating systems as they become available. TravelStorys is continually evolving with state-of-the-art technology, new design, and new user-friendly features.

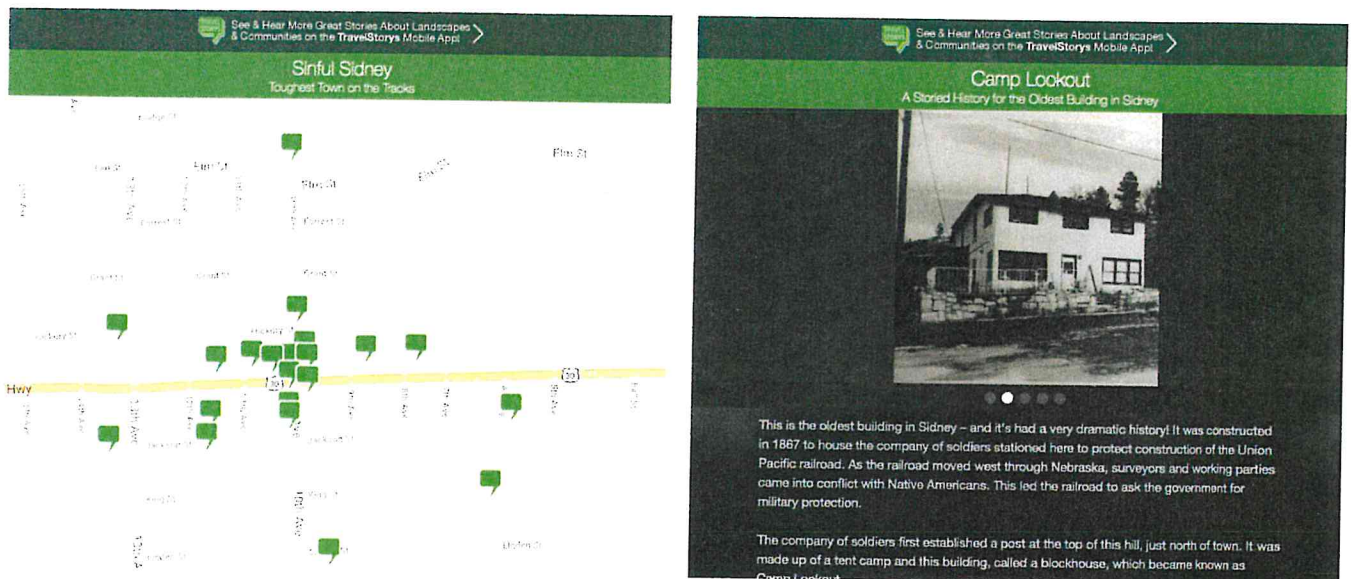
TravelStorys' patented technology allows users to listen to tours anywhere and at any time. Tours are easily downloaded in areas with wireless internet access or cell phone reception. Once the app is installed and a tour is selected, the tour will download onto the user's phone, and no further cell or data service is needed. Further data service is only required to browse web links or watch videos. Users can delete the tour at any time, though individual tours require little storage space. Users have the option to hear the audio automatically as they pass by sites in person, or they can manually access the stories remotely for trip planning or educational purposes.

The TravelStorys app is free to download for all users. The City of Moberly Historic District Tour will be available on the TravelStorys platform, where users can explore and access other tours near their current location and nationwide. As a shared platform, the

TravelStorys app serves as a community resource and economic development tool by promoting tours within close proximity, creating the opportunity to brand state or regional tours, linking to useful agency sites and, of course, enticing travelers to visit and learn about more places using the TravelStorys app.

## 2. TravelStorys Website Plug-in

The TravelStorys website plug-in allows users to access the tour content – audio, images, and text, and mapped site locations – through a web browser. This application is useful for viewing the tour remotely, trip planning, and exploring Moberly in an intuitive, easily orienting way. It also functions as a promotional tool, incentivizing users to download the mobile app version of the tour.



The website plug-in adds a new and exciting feature to an existing website in mere minutes. The plug-in is easy to install with a PHP file upload and API keys. The website version of the tour presents the tour exactly as it is viewed on the TravelStorys mobile app tour. If the mobile app tour is changed, those changes are automatically reflected in the website tour.

A website plug-in has been included in this proposal, as it is a valuable marketing tool.



## D. TravelStories Example Tours

### 1. Jackson Hole Historical Society & Museum – Historic Downtown Jackson

The buildings on this historic downtown walking tour hold a treasure trove of stories, revealing the unique Western history of Jackson Hole. Through the TravelStories tour, visitors can journey back in time by hearing fascinating stories while exploring the heart and history of downtown Jackson, Wyoming, visiting everything from homesteaders' cabins, Prohibition-era gambling joints and a former blacksmith shop to today's popular "watering holes" and the iconic elk-antler arches on the Town Square.

This tour is presented by the Jackson Hole Historical Society & Museum, which works to research, conserve and interpret the valley's history, and was funded in part by the Wyoming Cultural Trust Fund, serving the citizens of Wyoming by supporting its culture and heritage.

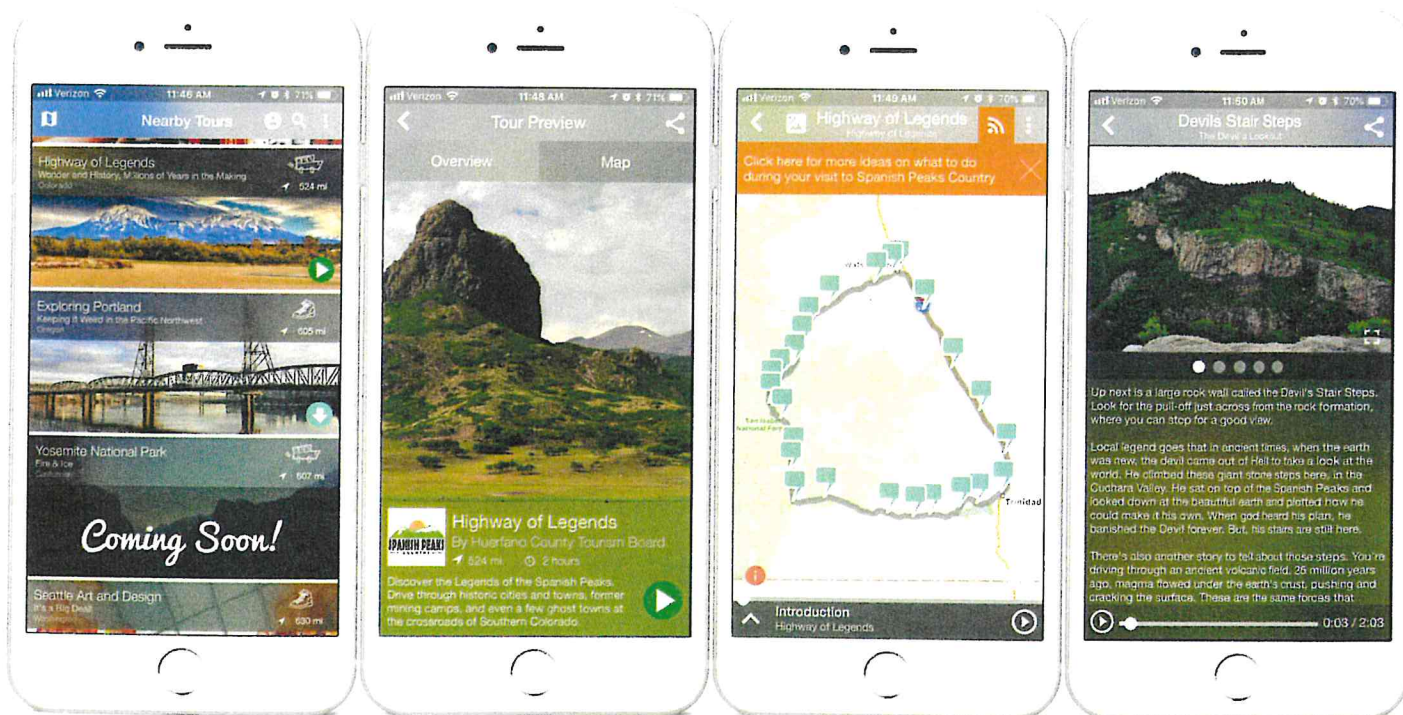


## 2. Huerfano County Tourism Board – Highway of Legends

Travel beneath the iconic Spanish Peaks on the Highway of Legends Scenic Byway. This driving tour takes you up into the Colorado mountains at 10,000 feet and down into the flat plains. Driving through historic cities and towns, former mining camps, and even a few ghost towns, visitors learn about the ancient geologic changes that formed the surrounding landscape over millennia and hear tales of the Old West, with its covered wagon trains and gun battles.

Visitors also learn about the coal and steel production that built America, starting right here in Huerfano County, Colorado. And visitors hear about the people who made it happen: coal miners, union laborers, and the mighty Mother Jones, “the most dangerous grandmother in America.” Of course, visitors will hear about the native people and the lives they lived here. There’ll be legends, ghost stories, and even a few rumors. And, finally, you’ll hear tips about local hikes, museums, and parks where you can stop to stretch your legs.

This audio tour is brought to visitors by the Huerfano Tourism Board, and made possible by a grant from the Colorado Tourism Office.



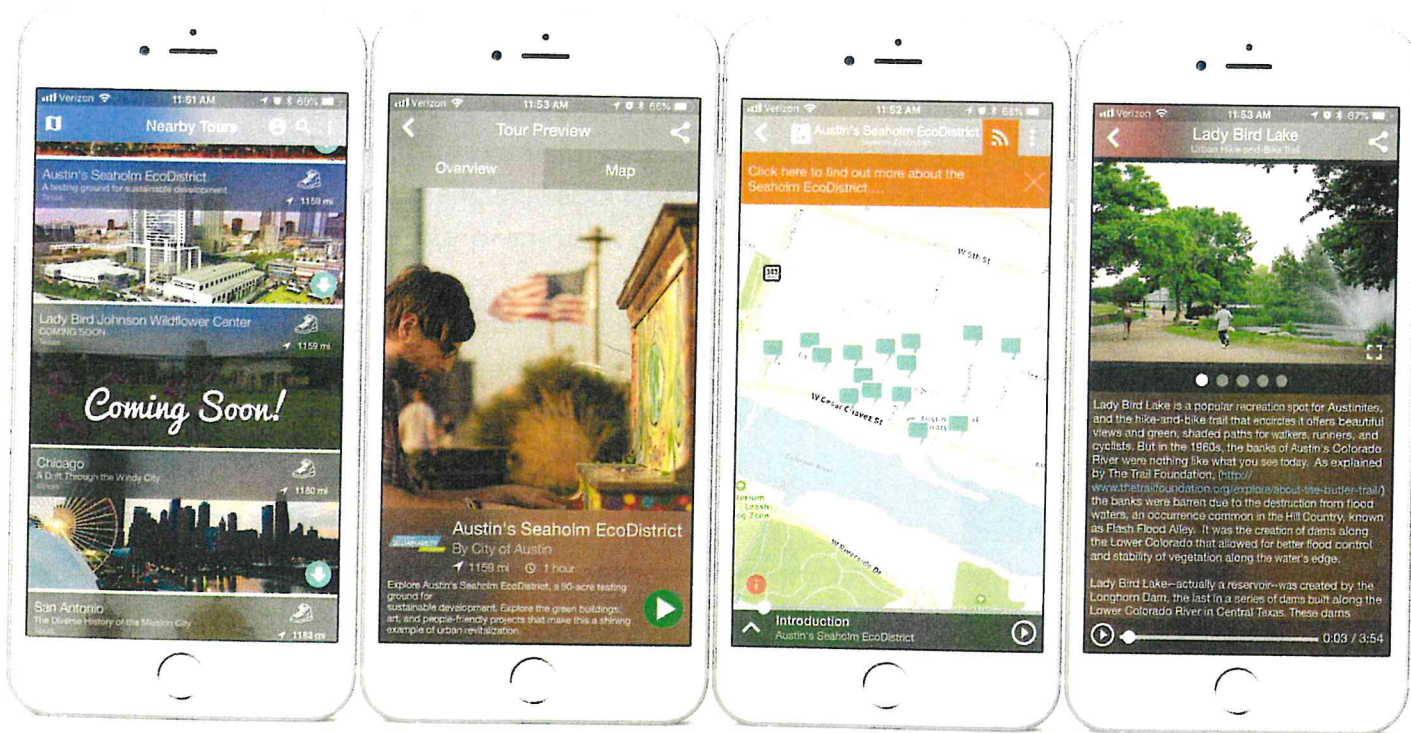


### 3. City of Austin, Sustainability Office – Austin’s Seaholm EcoDistrict

Welcome to the Seaholm EcoDistrict, a 90-acre, city-sponsored testing ground for innovative sustainable development. At the heart of the EcoDistrict is the former steam power plant for the City of Austin, but for many years the decommissioned plant lay derelict. The EcoDistrict has been brought back to life with green, people-friendly additions that reflect Austin’s spirit of originality and soul. Visitors can walk with TravelStorys, and the app will point out many special features — from green buildings and art to habitat-preservation projects.

Austin’s goal to be a net-zero greenhouse gas emissions community makes it an international leader in the fight against climate change. The Seaholm EcoDistrict helps achieve this goal by offering resources for zero-emission vehicles, building LEED-certified buildings, solar-powered charging stations, and much more. In addition, the Seaholm EcoDistrict creates people-friendly spaces, with public art and pedestrian-friendly walking and biking trails.

This walking tour is presented by the City of Austin’s Sustainability Office.

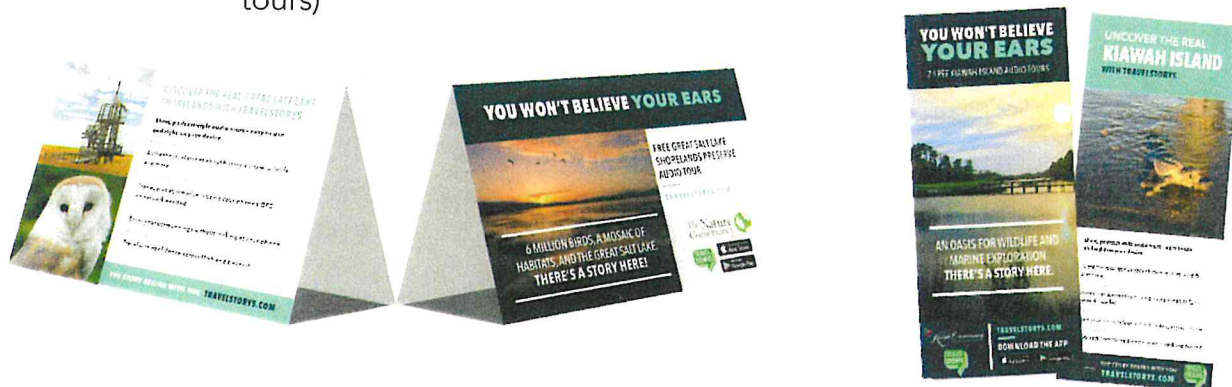


## E. Marketing

In addition to the value of the TravelStorys mobile platform for interpretation, education, and enlightening travel experiences, the TravelStorysGPS team uses the platform to build tour sponsor brands by investing in marketing its tours and tour sponsors. As a tour sponsor on the TravelStorys shared platform, the City of Moberly will be promoted in social and print media. Additionally, the City of Moberly will receive valuable information and guidance on ways to market mobile apps and to co-market the tour through its marketing channels. The TravelStorysGPS marketing director will provide useful marketing guidelines and a starter kit of marketing materials, which can be reproduced and widely distributed (See Appendix B).

Additionally, TravelStorysGPS' marketing team will coordinate with the tour sponsor in developing a tour branding strategy and marketing plan, and will participate in tour marketing in the following ways:

- TravelStorys Marketing Materials
  - "There's a Story Here!" stickers for display at story site locations
  - Tour-specific rack cards, table tents, and poster templates for reproduction and display at popular tourist venues
- TravelStorys Digital Marketing
  - In-app visual and audio messaging
  - TravelStorys website tour launch with continuous website promotion
  - Ongoing social media posts and TravelStorys e-newsletter features
  - Online tour promotion campaign (included in this proposal)
- TravelStorysGPS Marketing Initiatives:
  - In-person meetings with regional and state tourism offices
  - Regional and state tourism trade show presence (with multiple regional tours)





## II. Schedule & Deliverables

### A. Timeline

The TravelStorysGPS team can build the City of Moberly Historic District Tour according to the deadlines as laid out in the RFQ.<sup>1</sup> TravelStorysGPS has prepared a detailed work plan with a schedule to ensure that all tasks are outlined, and deadlines are met. The proposed tour-building schedule is below:

Task	End Date
<b>Phase I: Project Launch</b>	
TravelStorys Tour Launch Webinar	10/15/19
TravelStorys create work plan	10/17/19
Client approve work plan	10/22/19
Client set geotag sites on Google Maps - Story sites and map listings	11/1/19
Phone call base map discussion	11/8/19
TravelStorys send StoryBoard	11/15/19
TravelStorys Storytelling Webinar	11/15/19
<b>Phase II: Create Content</b>	
Client write draft 1	12/27/19
TravelStorys review draft 1	1/24/20
Client send draft 2	2/7/20
TravelStorys review draft 2 & approve	2/17/20
TravelStorys submit professional in-house narrator sample for editorial review	2/17/20
Submit final narrative text for approval/review prior to recording	2/17/20
TravelStorys record professional narration with in-house narrator	3/13/20
Client collect images & complete image spreadsheet	3/13/20
Client collect filler (music or other audio)	3/13/20
Submit sample of audio narration for review/approval prior to app going live	3/16/20
Introduce TravelStorys marketing coordinator to client	3/16/20
TravelStorys edit & compress audio	3/20/20
TravelStorys catalogue & compress images	3/20/20
<b>Phase III: Beta Testing</b>	
TravelStorys upload Beta I content onto app	4/3/20
TravelStorys send testing guidelines	4/6/20
Testing phone call	4/7/20

<sup>1</sup> TravelStorysGPS can supply information, materials, or send a team member to Moberly, MO, for support during public meetings, as outlined in the RFQ, if requested by the City of Moberly.

Client test tour	4/30/20
TravelStorys implement changes from testing onto the tour	5/15/20

**Phase IV: Tour Launch**

Submit draft of app design/layout for review before going live	5/29/20
Client & TravelStorys implement marketing and promotion plan	7/31/20
Publish tour - Submit final app	7/31/20

**Phase V: Subscription**

Begin client stewardship	8/2/20
Send client satisfaction survey	8/7/20

**Marketing Tasks**

Initial marketing call	TBD
Set launch date	TBD
Design first draft marketing materials	TBD
Send marketing best practices, social media templates, and design drafts	TBD
Send marketing starter kit	TBD
Launch Tour: Boost posts and digital marketing campaigns	TBD

**B. Subscription**

Annual subscription to the TravelStorys mobile platform provides numerous benefits and services and serves as a simple collective coverage package for all tour sponsors' tours. The TravelStorysGPS subscription benefits include up to four hours of direct support, which may be used to publish updated content and address technical questions. The subscription also gives clients access to software support and maintenance to ensure continuous presentation of the tour on the TravelStorys app platform. Quarterly reports are also included in the subscription package, summarizing the overall app and tour-specific analytics with information on download rates and demographics as well as other data available upon request. Other subscription benefits include: technological updates to enable the tour to be presented on new devices as they become available; support for technical issues that may arise; platform and server architecture upkeep and maintenance. The subscription will renew one year from the date the tour is launched.

**C. Deliverables**

In accordance with the above tour-building timeline, pending any unforeseen obstacles, the project will be completed by July 31, 2020. The City of Moberly can expect the following deliverables:

- All deliverables as outlined in the proposed work plan
- The City of Moberly Historic District Tour presented on the TravelStorys mobile app



- Remote tour testing and oversight of on-site tour testing to ensure a high-quality user experience
- Use of latest UX mobile location tracking technology
- A brand strategy & marketing plan to support the launch
- Subscription/maintenance starting July 31, 2020, (or launch date) for 12 months

### III. Resources & Staff

TravelStorysGPS has an experienced team of account managers, audio specialists, and app developers. The following staff members will be involved in the City of Moberly Historic District Tour (see Appendix A for resumes):

- Christie Koriakin, Director of Audio Production
- Kaitlyn Osborne, Director of Marketing
- David Worth, Director of Development

The TravelStorysGPS team has deep production, GIS, and app technology experience as well as strong expertise in storytelling and geolocational writing. Many of TravelStorysGPS' clients are building their third and fourth tours on the TravelStorys platform.

### IV. Pricing

#### A. Project Estimate

The estimate below reflects the scope of work outlined in this proposal. This is a nonbinding estimate of costs based upon information available at the time of submission and is valid for 60 days. This estimate does not constitute a contract. TravelStorysGPS may work with the City of Moberly to adjust the scope of this estimate to be in line with the City of Moberly's needs, budget, or project requirements. The estimate below reflects a suggested project scope based on the RFQ.

<b>CITY OF MOBERLY HISTORIC DISTRICT TOUR PROJECT COSTS</b>			
<b>TOUR PRODUCTION</b>			
Tour Setup	Shared Platform <sup>2</sup>	One-time <sup>3</sup>	\$3,000
Audio Tour Production	30 Geotags	One-time	\$10,000
Professional Narration	30 Geotags	One-time	\$1,400
Geolocational Site Production	70 Sites	One-time	\$7,000
<b>SUBTOTAL</b>			<b>\$21,400</b>
<b>WEBSITE PLUG-IN</b>			
Website Plug-in		3-year License	\$500
<b>SUBTOTAL</b>			<b>\$500</b>
<b>MARKETING</b>			
Premium Digital Marketing Strategy & Implementation <sup>4</sup>		One-time	\$2,500
<b>SUBTOTAL</b>			<b>\$2,500</b>
<b>SUBSCRIPTION</b>			
Tour Subscription	Up to 10,000 user sessions <sup>5</sup>	Annual	\$1,500
<b>SUBTOTAL</b>			<b>\$1,500</b>
<b>BUDGET SUMMARY</b>			
Tour Production			\$21,400
Website Plug-in			\$500
Premium Marketing & Promotion Package			\$2,500
Subscription – One Year			\$1,500
<b>TOTAL</b>			<b>\$25,900</b>

<sup>2</sup> The tour will be hosted and displayed on the TravelStorys mobile app shared platform.

<sup>3</sup> Tour setup is a one-time fee charged only with the first tour. Any future tours sponsored by the City of Moberly will not include a setup fee.

<sup>4</sup> Premium Digital Marketing Strategy & Implementation may be adjusted according to the project's budget or allocated to other suggested TravelStorys add-ons (available upon request).

<sup>5</sup> Pricing for higher annual user sessions available upon request.



**B. Invoicing Schedule**

TravelStorysGPS typically invoices for projects in three increments, but will adjust its invoicing schedule to align with the City of Moberly’s requirements if needed. The proposed invoicing schedule is outlined below:

PHASE	DUE DATE	PAYMENT	AMOUNT
Payment 1	Contract signed	50%	\$12,950
Payment 2	30 days after contract signed	40%	\$10,360
Payment 3	Tour published	10%	\$2,590
TOTAL YEAR 1			\$25,900
Subscription	Due annually on the tour’s publication date (up to 10,000 user sessions)		\$1,500

**V. Summary**

TravelStorys tours illuminate local stories and sites in entertaining and accessible ways to attract new audiences and enrich travel routes and destinations. The City of Moberly Historic District Tour will serve to engage and entertain residents and visitors in Moberly’s Historic District and will promote these interpretive historical stories through TravelStorys’ global audience.

TravelStorys' technology creates a user-friendly means of communication to host and expand the City of Moberly's reach, network, and exposure of the unique places in and around the Historic District. Working closely with the staff of the City of Moberly, the TravelStorysGPS team will create a highly customized and curated experience to draw visitors into the Historic District and encourage them to stay in Moberly longer and spend more tourism dollars locally.

TravelStorysGPS can provide client references upon request.

Thank you for your interest in building a quality mobile experience to attract more visitors and enrich their experiences in the City of Moberly. We look forward to working with you.

## Appendix A. Staff Resumes

Christie Koriakin  
[Christie.koriakin@gmail.com](mailto:Christie.koriakin@gmail.com)  
 (336) 262 9111  
 PO Box 1433  
 Jackson, WY 83001

### EDUCATION

#### **UNC-CHAPEL HILL**

B.A., Journalism/ Electronic Communication,  
 2007 B.A., Romance Languages: Spanish, 2007

### **START UP INSTITUTE**

Jackson, WY, Fall 2013

### QUALIFICATIONS

- Passion for storytelling
- Experience working with non-profits agencies, arts organizations
- Ability to juggle multiple projects and deadlines.
- Multi-media background in print, radio, film, design and social media

### PROFESSIONAL EXPERIENCE

#### **Account Manager & Director of Audio Production, TravelStorysGPS, LLC, December 2014–Present**

- Blend compelling storytelling with cutting edge technology
- Guide clients through the tour building process, from setting sites, recording audio, and writing scripts
- Expand TravelStorys tour network by engaging new tour sponsors.

#### **Public Affairs Director, KHOL 89.1, Jackson Hole Community Radio Inc, July 2010 – March 2014**

Developed a strategy for public affairs programming at the community radio in Jackson. Tasks included:

- Producing public affairs packages and interviews
- Training community volunteers in radio production and interview skills
- Managing online presence, including website and social media platforms

#### **Freelance Media, Various Organizations, January 2008 – Present**

In addition to formal employment, freelance media projects have included:

##### **Print:**

- Wrote features for The Jackson Hole News & Guide and Planet Jackson Hole

##### **Audio:**

- Produced Story-Corp-inspired pieces highlighting a women's mentoring program called Womentum
- Edited *Wyoming Stories* for broadcast on Wyoming Public Radio

##### **Video:**

- Directed and produced promotional piece about the work of Craighead Beringia South
- Developed fundraising film for a non-profit working in West Guinea, Africa called Woontanara Aid

#### **Wedding and Event DJ, Jackson Hole DJ May 2012 – Present**

Create the perfect audio and light ambience for couples' first day as a married couple.

#### **Associate Producer, Horizon Pictures, October 2008–February 2009**

Worked on several film projects, including *Cable to the Sky*, a documentary about the construction of the JHMR tram, which aired on the National Geographic series, *Megastructures*

#### **Research Assistant, Fleisherfilm, January 2008–April 2008**

Conducted research about Haitians living in the Dominican Republic for documentary film, *Cane & Able*

#### **Production Assistant, The Story with Dick Gordon, May 2007–August, 2007**

Researched and reviewed background information for nationally syndicated NPR program  
 Produced several segments including the story of one of the first civil rights sit-ins

**Kaitlyn Osborne**

Phone: (603) 828-4022

Email: [kmosborne14@gmail.com](mailto:kmosborne14@gmail.com)**EDUCATION**

Bachelor of Arts, Elon University, Elon, NC

May 2015

Major: Strategic Communications

GPA: 3.7

Minors: Sport and Event Management and International Studies

Semester Study Abroad: Alicante, Spain

August 2013 – December 2013

**PROFESSIONAL EXPERIENCE****Marketing Director & Client Coordinator, TravelStorysGPS**

March 2017 - Present

- Creating digital and print marketing campaigns for TravelStorys & tour sponsors Jackson, WY
- Developing & maintaining overall marketing strategies: campaigns, events, digital marketing, and PR
- Collaborating closely with sales and development teams to streamline product efficiencies
- Managing advertisements on the app
- Measuring ROI for creative tactics and projects
- Fostering relationships with community, tour sponsors, & potential clients

**Retail Ambassador & Community Outreach, Healthy Being Juicery**

August 2016 – March 2017

**Account Coordinator, AOR**

March 2016- July 2016

- Liaison between clients and in-house creative team Denver, CO
- Manage over 15 client projects that range from company rebrand to hosting events
- Write proposals for new projects, including project scope, step by step details creative briefs & pricing
- Multitask through internal database systems and emailing

**Waitress/Event Promoter, Blackbird**

Nov 2015 – Apr 2015

**Recruiter, Insight Global**

July 2015- October 2015

- Placed entry to high level professionals in the IT, accounting, finance industry Denver, CO
- Scheduled interviews, coordinated meetings, and conducted entire screening process
- Responsible for technical phone screens, interviews, reference checks, rates, correlated with managers, extended offers, informed about benefits, ran background checks, & worked with compliance from clients
- Trained incoming employees about Insight Global's entire process and values

**Event Management Manager, Campus Recreation**

January 2014 – May 2015

- Planned 12 Campus Recreation events throughout the year Elon, NC
- Monitored the event for safety, necessary improvements, and obtained feedback
- Created any forms for participants to organize the event
- Set up and cleaned up the entire event
- Constructed a follow-up assessment that illustrated feedback of the event from participants

**Facility Manager, Campus Recreation**

February 2013 – May 2015

- Provided customer service to participants Elon, NC
- Managed entire campus recreation facility
- Responded to emergency situations
- Handled cash and money transactions and scheduled events and activities

**RELATED EXPERIENCE****Design & Media Content Intern, The Bethany-Fenwick Area Chamber of Commerce**

May 2014-August 2014

- Created advertising campaigns and updated art work for events Fenwick Island, DE
- Advertised to the public about Chamber services
- Worked cohesively and effectively with team members on all Chamber client accounts

**SKILLS****Media:** AVID, In-Design, Photoshop, Illustrator, SimpleViewer, WordPress, Microsoft, PowerPoint, Twitter, Weebly**Equipment:** Sony HXR-NX700 Camera, Canon G12 Still Camera, Zoom Digital Voice Recorder Handheld Microphone,

Lavalier Microphone, XLR cable

**Language:** Proficient in Spanish



# David Worth

david@davidworth.me | (623) 606-5656 | Parker, CO 80134 | <http://davidworth.me>

## Experience

### Lead Software Engineer

August 2016 - Present

TravelStorysGPS, LLC

Denver, CO

Technologies: objective-c swift ios java .net vs2015 git unit-testing gimp photoshop admob iad  
itunes-connect rest mvc json cocoa xml lamp android o-auth-v2 continuous-integration  
php html css javascript jquery sql mysql

- Maintained, updated, and provided technical support for existing iOS and Android applications. Created feature updates rolled out on a monthly basis.
- Created php-based REST API to serve data to new product groups.
- Created OAuth v2 based authentication systems for TravelStorys APIs.
- Created new applications for iOS and Android product groups and new template applications for white-label product groups.
- Developed 2 new product groups for web based applications and web-based editing tools.

### Full Stack Developer

Worldlink Technologies, inc.

July 2012 - May 2016

Portland, OR (Remote)

Technologies: php html css javascript jquery sql mysql objective-c osx ftp connection-kit quicktime  
linux apache2 lamp centos7 ssh vim paypal stripe xcode

### Software Engineer

October 2009 - Present

Rahket, LLC (Self-Employed)

Denver, CO

Technologies: objective-c swift ios c++ c# java unreal-engine4 .net steam vs2015 git 3d-modeling gimp  
uv-unwrapping photoshop admob iad itunes-connect rest tvos mvc json cocoa xml xampp  
php html css javascript jquery sql mysql android blender crazybump

- Created 14 original iOS apps with a combined user base of 10,000 users, most of which are available on the iOS App Store. A full list is available upon request.
- Published 2 titles to Steam, with a combined user base of over 2,000 users. The highest-rated has an 88% recommendation from players.
- Designed and coded over 12 unique websites, most including front-end HTML, CSS, JavaScript, jQuery, and PHP, as well as back-end databases.

### Customer Service Representative

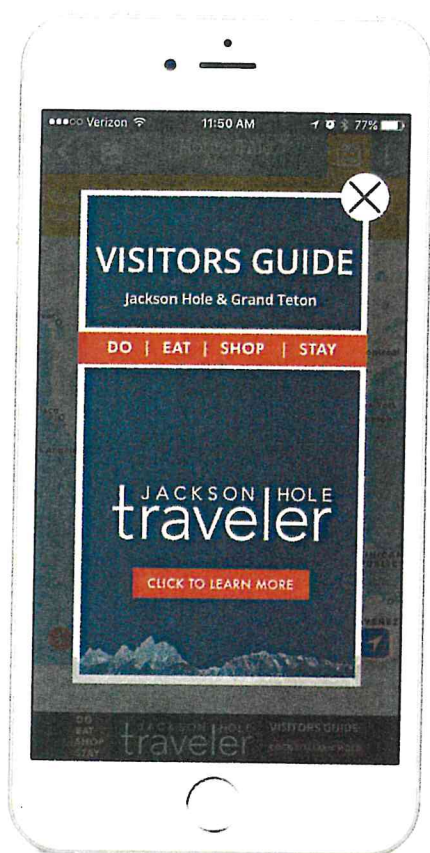
October 2011 - August 2012

JC Penney

Aurora, CO



## Appendix B. Advertising Opportunities

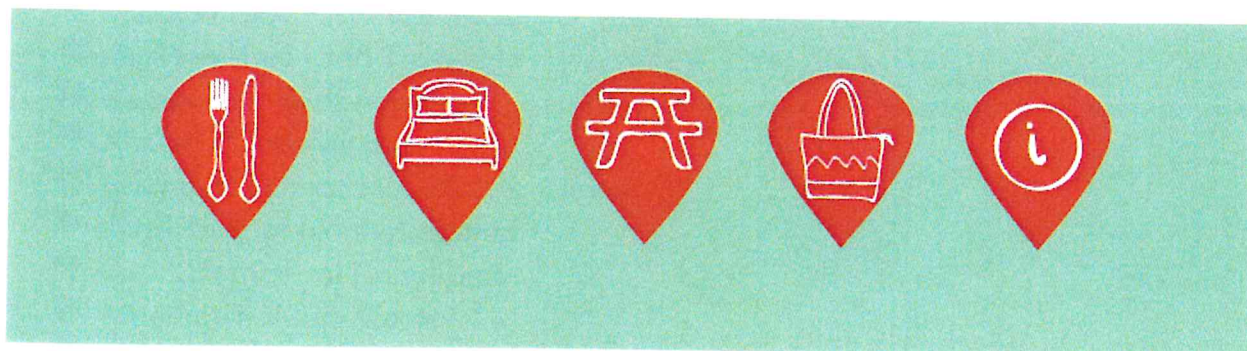


### BENEFITS

- ✓ Generate Revenue
- ✓ Capture New Audiences
- ✓ Launch Ads at Precise Locations
- ✓ Measure Success with User Analytics
- ✓ Promote with Multi-Media Content

### OPTIONS

- #1 Site-Specific Messaging
- #2 Embedded Audio
- #3 Visual Displays
- #4 Map Listing



## Appendix C. Tour Sponsors (Client) List

- Androscoggin Land Trust
- Austin Department of Sustainability
- Bayou Land Trust
- Birmingham Industrial Heritage Trail
- BLM
- Buffalo Bill Center for the West
- Cal-State Fullerton
- Carbon County Visitors Center
- Catskill Center
- Catskill MountainKeeper
- City of Sidney
- Community Library of Ketchum
- Conservation Trust for North Carolina
- Crook County Museum
- Crook County Promotion Board
- D&R Greenway
- Dinosaur Diamond Scenic Byway
- Downtown Sheridan Association
- Flaming Gorge- Unitas National Scenic Byway
- Fort Washakie High School
- Friends of A1A Scenic Byway
- GaperGuide, LLC
- Gillette Main Street
- Goshen County Economic Development Corporation
- Grand Teton National Park Foundation
- Historic Hudson River Towns
- Huerfano County Tourism Board.
- Izi Travel
- Jackson Hole Airport
- Jackson Hole Historical Society & Museum
- Jackson Hole Land Trust
- Kampgrounds of America
- Kiawah Conservancy
- Lady Bird Johnson Wildflower Center
- Land Trust of North Alabama
- Lusk Chamber of Commerce
- Meeteetse Visitor Center
- Montgomery County
- National Museum of Wildlife Art

- New Jersey Natural Lands Trust
- Payson City
- Pikes Peak - America's Mountain
- Powell Economic Development Corp
- Prairie Development
- Rawlins Main Street
- Red Mountain Park
- Rocky Mountain Wild
- Route 66 Alliance
- Sheridan Community Land Trust
- Snow King
- Storm King
- Taste Wine Guides, LLC
- Teton Regional Land Trust
- Teton Science Schools
- The Gov. Mario M. Cuomo Bridge
- The Nature Conservancy - Idaho
- The Nature Conservancy - Michigan
- The Nature Conservancy - Utah
- The Trust for Public Land
- Town of Greybull
- Visit Casper
- WY Humanities Council
- WY State Historic & Preservation Office
- WY State Historic & Preservation Office
- WyoHistory.org



## Appendix D. Disclosure of Conflicts of Interest

TravelStorysGPS has no conflicts of interest to disclose in regard to this City of Moberly RFQ. No TravelStorysGPS employee, staff member, or related family member serves as an officer, director, trustee, partner, or employee of the City of Moberly.

There are no known situations that undermine, have the appearance of undermining, or potential to undermine the impartiality of the City of Moberly or TravelStorysGPS because of the possibility of a conflict between an employee's self-interest and professional interest.

Furthermore, TravelStorysGPS is not aware of any other apparent or real conflict that may compromise a City of Moberly employee's, director's or officer's decisions or judgment in carrying out his/her responsibilities with impartiality.



## Appendix E. Compensation Method

TravelStorysGPS is compensated on a project basis, rather than an hourly rate, except when the scope of a project exceeds the terms laid out in the contract. Normal and customary expenses incurred in the course of project execution are the responsibility of TravelStorysGPS. Following signing of the Client Agreement, any significant changes to this Statement of Work or associated work plan will be agreed to by both parties in writing and may be subject to additional charges. Before beginning any significant services not outlined in this Statement of Work, TravelStorysGPS will present new documentation to the City of Moberly for review, approval, and payment (if necessary). Unless otherwise agreed to, TravelStorysGPS' hourly rate for additional work outside this Statement of Work is \$200 per hour.

TravelStorysGPS will invoice the City of Moberly based on an invoicing schedule laid out at project start. TravelStorysGPS accepts payment by check and electronic deposit.

CITY OF MOBERLY

App Developer

"BID OPENING"  
Sign-In Sheet

Date: 8-27-19 3:04pm

Name

Company

Emily Meyer-Furlong

City of Moberly Mo.

Shannon Hance

City of Moberly, MO

CITY OF MOBERLY

"BID OPENING"

Date: 8-27-19

Travel Agency \$ 25,900

Low Buddy Apps \$ 84,8925

Map N Tour \$ 25,000

\_\_\_\_\_ \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_

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\_\_\_\_\_ \$ \_\_\_\_\_

# City of Moberly City Council Agenda Summary

Agenda Number: \_\_\_\_\_ WS #9.

Department: Finance

Date: September 16, 2019

**Agenda Item:** Receipt of bids for lease purchase financing of energy performance contracting projects.

**Summary:** Lease purchase financing proposals were solicited from 7 entities for approximately \$4.6 million in projects for the Public Utilities Department. Proposals were received from First State Community Bank (3.190%) and Signature Public Funding Corp. (2.945%). Copies of those bids are attached for your review. Signature Public Funding is a firm that the energy performance consultant, Energy Solutions Professionals, has used for multiple projects with other clients with excellent results. Terms in their proposal require acceptance of their bid by September 18, 2019, so if you are agreeable we would like to provide that acceptance to them. Staff recommends moving forward with acceptance of these bids and ultimately entering into a contract with Signature Public Funding.

**Recommended Action:** Accept these bids and direct staff to provide acceptance of the bid from Signature Public Funding.

**Fund Name:** N/A

**Account Number:** N/A

**Available Budget \$:** N/A

ATTACHMENTS:		Roll Call	Aye	Nay
<input type="checkbox"/> Memo	<input type="checkbox"/> Council Minutes	<b>Mayor</b>		
<input type="checkbox"/> Staff Report	<input type="checkbox"/> Proposed Ordinance	M___ S___ <b>Jeffrey</b>	___	___
<input type="checkbox"/> Correspondence	<input type="checkbox"/> Proposed Resolution			
<input checked="" type="checkbox"/> Bid Tabulation	<input type="checkbox"/> Attorney's Report	<b>Council Member</b>		
<input type="checkbox"/> P/C Recommendation	<input type="checkbox"/> Petition	M___ S___ <b>Brubaker</b>	___	___
<input type="checkbox"/> P/C Minutes	<input type="checkbox"/> Contract	M___ S___ <b>Kimmons</b>	___	___
<input type="checkbox"/> Application	<input type="checkbox"/> Budget Amendment	M___ S___ <b>Davis</b>	___	___
<input type="checkbox"/> Citizen	<input type="checkbox"/> Legal Notice	M___ S___ <b>Kyser</b>	___	___
<input type="checkbox"/> Consultant Report	<input type="checkbox"/> Other _____		Passed	Failed





# First State Community Bank

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September 13, 2019

Attn: Greg Hodge, Director of Finance  
City of Moberly  
101 West Reed Street  
Moberly, Missouri 65270

Cc: Jeff Flathman, President  
Energy Solutions Professionals

Re: Request for Proposal for Financing of Energy Performance Contract

First State Community Bank is pleased to provide the following proposal to serve as lessor to the City of Moberly's Energy Performance Contract project. Our proposal is outlined below:

**Lessee** City of Moberly

**Lessor** Joe Miller, President  
**Contacts** First State Community Bank  
100 South 4<sup>th</sup> Street  
Moberly, Missouri 65270  
(573) 818-3784  
[jrmiller@fscb.com](mailto:jrmiller@fscb.com)

Curt Gilliam, Vice President  
First State Community Bank  
302 West St. Louis Street  
Pacific, Missouri 63069  
(573) 701-6062  
[cgilliam@fscb.com](mailto:cgilliam@fscb.com)

**About Us** Founded in 1954, First State Community Bank is a financial leader in the State of Missouri committed to growing stronger communities by helping people and organizations achieve and protect financial success. Since its inception in 2013, the First State Community Bank Governmental Lending Team has completed over 170 financings for Missouri municipalities with a total amount financed of over \$115,000,000.

**Pricing**

Interest Rate:	3.19%
Interest Day Basis:	30/360
Amortization:	1 Year Construction Period / 10 Year Amortization Quarterly Principal & Interest (See Appendix A&B)

The proposal and rates committed to in this letter are based on designating the lease as a bank qualified, tax-exempt obligation. If the tax status were to change during the term of the lease, the interest rate would be increased by 1.00% to the date the lease was deemed taxable. The interest rate quoted above is dependent on the lease closing within 60 days from the date of this letter.



# First State Community Bank

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<b>Drawdown Structure</b>	First State Community Bank proposes using a 12 month drawdown interest structure during the construction period. This means that for the first 12 months of the lease, interest accrues only on spent moneys. Funds will be advanced as requested by the City with all funds advanced within 12 months of lease closing.
<b>(No Escrow Account)</b>	A lease structure where the full amount is funded on day one and deposited to an escrow account (as contemplated in the RFP) will always result in some amount of negative arbitrage (the spread between the interest rate on the lease and the escrow earnings rate) on unspent balances. Conversely, a drawdown interest structure has no negative arbitrage and is the most cost-efficient method for financing construction periods. Furthermore, a drawdown structure removes the need to manage the investments of an escrow account and eliminates the cost of an escrow trustee.
<b>Prepayment</b>	The lease can be prepaid at no penalty in part on each annual anniversary date of the lease or in full at any time with 30 days' notice provided to the lessor.
<b>Lessor Counsel</b>	It is our understanding that the City has engaged Gilmore & Bell to serve as Special Tax Counsel for the lease transaction. So long as Gilmore & Bell prepares the Equipment Lease Purchase Agreement and related legal documents for the tax-exempt financing, First State Community Bank will not require separate lessor counsel.
<b>Other Fees</b>	None.
<b>Reserve Fund</b>	First State Community Bank will not require a debt service reserve fund.
<b>Other / Conditions Precedent</b>	First State Community Bank will require a security interest in the leased equipment. This proposal is subject to First State Community Bank's Executive Loan Committee approval. Proposed terms are contingent upon application to the Missouri FIRST linked deposit program.

We greatly appreciate the opportunity to submit this proposal to you. Should you have any questions or if we may be of further service, please do not hesitate to contact me.

Sincerely,

Joe Miller  
President

**Appendix A**  
City of Moberly

**Preliminary Sources & Uses of Funds**

**Sources**

Lease Proceeds	4,642,447.00
Total	<u>4,642,447.00</u>

**Uses**

Water Meters	1,958,508.00
Advanced Metering Infrastructure	1,651,892.00
Billing & Accounting Software System	414,966.00
SBR Blowers / VFDs at Wastewater Treatment Plant	474,929.00
VFDs at Water Treatment Plant	97,128.00
Water Treatment Plant PLC Controller Upgrade	<u>45,024.00</u>
Total	4,642,447.00

**Appendix B**  
**City of Moberly**

**Preliminary Payment Schedule**

Payment Date	Principal	Rate	Interest	Total P&I	Remaining Balance
11/1/2019	Construction Period *				
11/1/2020			80,217.62	80,217.62	4,642,447.00
2/1/2021	98,990.26	3.19%	37,023.51	136,013.77	4,543,456.74
5/1/2021	99,779.70	3.19%	36,234.07	136,013.77	4,443,677.04
8/1/2021	100,575.45	3.19%	35,438.32	136,013.77	4,343,101.59
11/1/2021	101,377.53	3.19%	34,636.24	136,013.77	4,241,724.06
2/1/2022	102,186.02	3.19%	33,827.75	136,013.77	4,139,538.04
5/1/2022	103,000.96	3.19%	33,012.81	136,013.77	4,036,537.08
8/1/2022	103,822.38	3.19%	32,191.39	136,013.77	3,932,714.70
11/1/2022	104,650.38	3.19%	31,363.39	136,013.77	3,828,064.32
2/1/2023	105,484.95	3.19%	30,528.82	136,013.77	3,722,579.37
5/1/2023	106,326.20	3.19%	29,687.57	136,013.77	3,616,253.17
8/1/2023	107,174.15	3.19%	28,839.62	136,013.77	3,509,079.02
11/1/2023	108,028.87	3.19%	27,984.90	136,013.77	3,401,050.15
2/1/2024	108,890.39	3.19%	27,123.38	136,013.77	3,292,159.76
5/1/2024	109,758.80	3.19%	26,254.97	136,013.77	3,182,400.96
8/1/2024	110,634.12	3.19%	25,379.65	136,013.77	3,071,766.84
11/1/2024	111,516.43	3.19%	24,497.34	136,013.77	2,960,250.41
2/1/2025	112,405.78	3.19%	23,607.99	136,013.77	2,847,844.63
5/1/2025	113,302.21	3.19%	22,711.56	136,013.77	2,734,542.42
8/1/2025	114,205.79	3.19%	21,807.98	136,013.77	2,620,336.63
11/1/2025	115,116.59	3.19%	20,897.18	136,013.77	2,505,220.04
2/1/2026	116,034.64	3.19%	19,979.13	136,013.77	2,389,185.40
5/1/2026	116,960.01	3.19%	19,053.76	136,013.77	2,272,225.39
8/1/2026	117,892.78	3.19%	18,120.99	136,013.77	2,154,332.61
11/1/2026	118,832.96	3.19%	17,180.81	136,013.77	2,035,499.65
2/1/2027	119,780.67	3.19%	16,233.10	136,013.77	1,915,718.98
5/1/2027	120,735.91	3.19%	15,277.86	136,013.77	1,794,983.07
8/1/2027	121,698.78	3.19%	14,314.99	136,013.77	1,673,284.29
11/1/2027	122,669.33	3.19%	13,344.44	136,013.77	1,550,614.96
2/1/2028	123,647.61	3.19%	12,366.16	136,013.77	1,426,967.35
5/1/2028	124,633.71	3.19%	11,380.06	136,013.77	1,302,333.64
8/1/2028	125,627.66	3.19%	10,386.11	136,013.77	1,176,705.98
11/1/2028	126,629.54	3.19%	9,384.23	136,013.77	1,050,076.44



**Appendix B**  
**City of Moberly**

**Preliminary Payment Schedule (Continued)**

Payment Date	Principal	Rate	Interest	Total P&I	Remaining Balance
2/1/2029	127,639.41	3.19%	8,374.36	136,013.77	922,437.03
5/1/2029	128,657.33	3.19%	7,356.44	136,013.77	793,779.70
8/1/2029	129,683.38	3.19%	6,330.39	136,013.77	664,096.32
11/1/2029	130,717.61	3.19%	5,296.16	136,013.77	533,378.71
2/1/2030	131,760.07	3.19%	4,253.70	136,013.77	401,618.64
5/1/2030	132,810.86	3.19%	3,202.91	136,013.77	268,807.78
8/1/2030	133,870.03	3.19%	2,143.74	136,013.77	134,937.75
11/1/2030	134,937.75	3.19%	1,076.02	136,013.77	0.00
<b>Total</b>	<b>4,642,447.00</b>		<b>878,321.42</b>	<b>5,520,768.42</b>	

**Preliminary Draw Schedule**

Draw Date	Draw Amount	Rate	Interest	Accumulated Interest	Cumulative Draws
11/1/2019	386,870.58	3.19%	-	-	386,870.58
12/1/2019	386,870.58	3.19%	1,028.43	1,028.43	773,741.17
1/1/2020	386,870.58	3.19%	2,056.86	3,085.29	1,160,611.75
2/1/2020	386,870.58	3.19%	3,085.29	6,170.59	1,547,482.33
3/1/2020	386,870.58	3.19%	4,113.72	10,284.31	1,934,352.92
4/1/2020	386,870.58	3.19%	5,142.15	15,426.46	2,321,223.50
5/1/2020	386,870.58	3.19%	6,170.59	21,597.05	2,708,094.08
6/1/2020	386,870.58	3.19%	7,199.02	28,796.07	3,094,964.67
7/1/2020	386,870.58	3.19%	8,227.45	37,023.51	3,481,835.25
8/1/2020	386,870.58	3.19%	9,255.88	46,279.39	3,868,705.83
9/1/2020	386,870.58	3.19%	10,284.31	56,563.70	4,255,576.42
10/1/2020	386,870.58	3.19%	11,312.74	67,876.44	4,642,447.00
11/1/2020	-	3.19%	12,341.17	80,217.62	4,642,447.00

\* Interest during construction period assumes twelve equal monthly draws.

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**PROPOSAL AND TERMS SHEET**

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Proposal Response to:

Request for Proposal for Financing of  
Energy Performance Contract  
For  
City of Moberly  
\$4,642,450

By and Between

**Signature Public Funding Corp.**

and

**City of Moberly, Missouri**

\*Subject to change

---



**SIGNATURE  
PUBLIC FUNDING**

Signature Public Funding Corp.,  
a wholly-owned subsidiary of Signature Bank



**SIGNATURE**  
PUBLIC FUNDING

Chris Youngs Mitchell, Executive Sales Officer  
303-617-1290 (Office)  
303-919-2929 (Mobile)  
[cmitchell@signatureny.com](mailto:cmitchell@signatureny.com)

September 13, 2019

Greg Hodge, Director of Finance  
City of Moberly  
101 West Reed Street  
Moberly, MO 65270  
[gregh@cityofmoberly.com](mailto:gregh@cityofmoberly.com)

**RE: City of Moberly, MO – Request for Financing Proposal due September 13, 2019**

Dear Mr. Hodge:

Signature Public Funding Corp. (“SPFC” or “Lessor”) is pleased to present to the City of Moberly (the “City” or “Lessee”) its Bank Qualified or Non-Bank Qualified, Tax-exempt Lease Purchase financing proposal (the “Proposal”) for the financing of energy conservation and facility improvement measures (the “Equipment”). The terms and conditions of our Proposal are outlined in the attached proposal and terms sheet (the “Proposal” or “Terms Sheet”).

Thank you for this opportunity to present our Terms Sheet to you. We look forward to committing our resources, our members, and the expertise of SPFC to provide the City of Moberly with the most flexible and effective contracting package. We will work with you to develop a repayment schedule that best meets the savings of the project and the budgetary needs of the City.

We look forward to your favorable acknowledgment.

Sincerely,

*Chris Mitchell*

Chris Youngs Mitchell, Executive Sales Officer

Cc: Jeff Flathman, Energy Solutions Professionals, [jeff@energyesp.com](mailto:jeff@energyesp.com)

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PROPOSAL & TERMS SHEET: BACKGROUND AND PARTIES

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City of Moberly

Tax-exempt Lease Purchase Financing – Energy Conservation Measures, \$4,642,450

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**LESSEE:** The City of Moberly (the “City” or “Lessee”), a political subdivision or body corporate and politic of the State of Missouri and qualifies as a political subdivision within the meaning of Section 103(c) of the Internal Revenue Code of 1986, as amended (the “Code”).

**LESSOR:** Signature Public Funding Corp., a wholly-owned subsidiary of Signature Bank (“SPFC” or “Lessor”), or its Assignee.

**TYPE OF FINANCING:** A tax-exempt Lease Purchase Agreement (the “Lease”) to be executed between the Lessee and Lessor. The Lessee will be responsible for all costs of operation, maintenance, insurance, taxes (if applicable) and expenses imposed by the ownership or possession of the Equipment. Said Lease shall be subject to the annual appropriation of funds by Lessee’s governing body. The Lease shall be governed by the laws of the State of Missouri and shall comply with all applicable state and federal laws and regulations. Lease Payments will be computed on the basis of a 360-day year of twelve 30-day months with the first quarterly payment due one month after the anticipated 12 month construction period.

**TAX EXEMPT STATUS:** The Lease will be a tax-exempt financing such that the interest component of the Lease Payments will be excludable from the Lessor’s gross income for federal income tax calculations and exempt from all taxation in the State. The Lessee covenants and agrees to comply with all requirements of the Internal Revenue Code of 1986, as amended, and all other applicable rules, laws, regulations and promulgations necessary to keep the interest portion exempt from such Federal and State income taxes. If as a result of the Lessee’s failure to comply with the foregoing covenant or a change in the law and the interest portion of the Lease payments is included in the Lessor’s federal or state gross income tax calculations, then the interest due under the Lease may be adjusted for the effect of the failure or



change, together with any fees or penalties resulting if due to change or noncompliance.

The City reasonably anticipates the total amount of tax-exempt obligations (other than private activity bonds) to be issued by the City during calendar year 2019 will not exceed ten million (\$10,000,000.00) dollars and the transaction will be deemed "Bank Qualified" for federal tax purposes. This Proposal is also applicable to a Non-Bank Qualified transaction.

The City will hold legal title to the Equipment, and federal tax ownership will be deemed to be with the City. The Lessor has not provided, nor will it provide tax or accounting advice to the Lessee regarding this transaction or the treatment thereof for tax and accounting purposes. The Lessor is not a registered financial advisor, nor registered with the MSRB or as a broker-dealer in securities. The Lessee has obtained independent tax, financial advisory, securities and accounting advice as it deems necessary.

An 8038-G will be provided with respect to the Lease executed in connection herewith.

**PROJECT/USE OF PROCEEDS:**

The equipment will consist of energy conservation and facility improvement measures as more fully described in the Request for Financing Proposal (the "Equipment"). The specific items, makes, models and manufacturers/vendors of the Equipment will be selected by the Lessee (subject to the approval of the Lessor, which shall not be unreasonably withheld) and more fully set forth on the Lease Equipment Schedule and/or Acceptance Certificate delivered in connection with the draw from any escrow account.

**PROPOSAL & TERMS SHEET: BACKGROUND AND PARTIES**

City of Moberly

Tax-exempt Lease Purchase Financing – Energy Conservation Measures, \$4,642,450

**TERM, RATES, AND PAYMENTS:**

OPTION	CLOSING DATE	APPROXIMATE FINANCING AMOUNT	TERM	AVERAGE LIFE	INTEREST RATE*	STRUCTURE	PAYMENT DUE	FEES
1	On or before October 18, 2019	\$4,642,450*	10.83 years	6.35 years	2.945%**	Quarterly	First P & I payment due one month after 12 month construction period***	Documentation - \$0 Legal - \$0 Signature Bank as Escrow Agent - \$0
2	On or before October 18, 2019	\$4,642,450*	10.58 years	6.21 years	2.945%**	Quarterly	First P & I payment due one month after 12 month construction period***	Documentation - \$0 Legal - \$0 Signature Bank as Escrow Agent - \$0

\* Subject to change

\*\*The Interest Rates above are fixed and locked assuming that this Proposal is accepted on or before September 18, 2019 and the transaction closes on or before October 18, 2019. SPFC shall use all reasonable efforts to honor the quoted interest rate after the expiration date; however, SPFC reserves the right to reset the rate if the transaction is not closed on or before October 18, 2019.

\*\*\* Sample amortization schedules provided. We will work with the City to develop a repayment schedule that best meets the City’s budgetary needs and savings of the project.

**RATE LOCK EXPIRATION:**

As noted above, the Interest Rate quoted shall be held firm for lease closing on or before October 18, 2019 (“Closing Date”) provided the Lessee notifies SPFC in writing that the proposal has been accepted, subject to governing body approval, by September 18, 2019 (“Proposal Expiration Date”); which may be extended by the mutual agreement of the parties. The Proposal Expiration Date and Estimated Closing Date shall be referred to as the “Expiration Date”. SPFC shall use all reasonable efforts to honor the quoted interest rate after the Expiration Dates; however, SPFC reserves the right to reset the rate if the transaction is not closed on or before October 18, 2019. Once set, the Interest Rate and Payments will remain fixed for the term. SPFC will work with the City to facilitate a lease closing as quickly as possible with receipt of all properly executed lease documentation.

**PREPAYMENT OPTIONS:**

The Lessee can exercise its right to prepay its obligations under the Lease in whole (partial prepayments are permitted with respect to damaged items of Equipment or unused lease proceeds remaining in the Escrow Account) on any scheduled payment date following 30 days' notice by paying the Prepayment Price to the Lessor. Prepayment Price is equal to the sum of: (a) the Lease Payment due on such date, (b) all other amounts due and owing under the Lease, and (c) 102% of the Remaining Principal Balance years 1-3, 101% of the Remaining Principal Balance thereafter. We are open to discussion concerning prepayment terms.

**SECURITY:**

The Lessee will grant Lessor a first priority and perfected security interest in the Equipment, Escrow Fund, and all proceeds with respect to the foregoing. Lessor will file UCC-1 fixture financing statements in order to perfect its security interest at its cost and expense; provided, however, that Lessee will provide Lessor with all reasonably requested information in order to make such filings.

**ESCROW FUNDING:**

SPFC has assumed funding of the Lease Proceeds into an Escrow Account established pursuant to an Escrow Agreement (the "Escrow"). The Escrow Account shall be used to pay contractors and vendors and any fees (if any) associated with the financing. The Escrow shall be provided by Signature Bank (the "Escrow Agent") using the Escrow Agent's standard form of escrow agreement. SPFC will review and approve the Lessee requested escrow disbursements prior to the Escrow Agent disbursing funds. The Lessee will be responsible for all escrow fees charged by the Escrow Agent (if any). Signature Bank does not charge an escrow set-up fee. It is assumed that all interest earnings (if any) will accrue for benefit of the Lessee and that unused portions of the escrow account will be applied to the Prepayment of the Lease.

**REIMBURSEMENT:**

If the Lessee intends to be reimbursed for any cost associated with the Project, the RFP or the Lease financing, intent for reimbursement from the Lease Proceeds must be evidenced and must qualify under the Treasury Regulation Section 1.150.2.

**INSURANCE:**

The Lessee shall furnish evidence of continuing all-risk property and casualty coverage for the greater of the Prepayment Price and/or replacement value of the Equipment and liability coverage of at least \$1,000,000 per occurrence for each property and bodily injury liability, with a minimum of \$3,000,000 aggregate for the Lease financed hereunder for the full term thereof. Such property and liability coverages shall, respectively, name Lessor as loss payee and additional insured. Lessee may choose to self-insure or provide alternate coverage on the terms and conditions acceptable to and approved by the Lessor.

**AUTHORIZED SIGNORS:**

The Lessee's governing body shall provide SPFC with its resolution or other evidence of authority to acquire the Equipment, enter into the Lease/financing thereof, and to execute the Lease Documentation and shall designate the individual(s) to execute all necessary documents used therein.

**LEGAL OPINION:**

The Lessee's counsel shall furnish SPFC with a validity and tax opinion covering, *inter alia*, the tax-exempt nature of this transaction, the authority of the City, the approval of the Project, and the approval of the documents used herein. This opinion shall be in a form and substance satisfactory to SPFC; however, the City's internal counsel may deliver such opinion. The Lessee shall be responsible for its own costs.

**LEASE DOCUMENTATION:**

The Lease Documentation will be prepared by SPFC and subject to approval by the Lessee, its counsel, SPFC, and its counsel. Documentation shall include all standard representations, warranties, and covenants typically associated with a transaction of this nature, including any requirements of SPFC's credit approval. A sample lease agreement may be provided upon request.

**PAYMENT AND PERFORMANCE BONDS:**

The Lessor requires to be listed as dual obligee on the payment and performance bonds as provided by Energy Solutions Professionals. No draws from Escrow shall be permitted until such bonds are in place.



**DUE DILIGENCE:**

Where not available in the public domain, and at reasonable request by the Lessor, the Lessee shall provide documentation and information that may include items such as a final executed copy of any vendor performance contract with detail of projected cost savings and timing of savings, three (3) years of current financial statements, budgets, demographics, and such other financial information relating to the ability of the Lessee to continue the Lease as may be reasonably requested by SPFC. Availability of the Director of Finance to satisfactorily answer any credit questions posed or provide any additional financial information requested to include a pro forma to address how the City will cover the debt service will be required. SPFC has completed a preliminary financial review and this proposal is subject to receipt of the above mentioned and subject to formal credit approval as set forth below.

This proposal shall not be construed as a commitment to a lease or lend by and is subject to final credit approval by the Credit/Investment Committee of Signature Public Funding Corp. and Signature Bank and approval of the definitive lease documents and final project in SPFC's sole discretion. Any and all capitalized terms not specifically defined herein shall be given their meaning under the Lease Documents.

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**PROPOSAL & TERMS SHEET: PROPOSAL ACCEPTANCE**

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City of Moberly

Tax-exempt Lease Purchase Financing – Energy Conservation Measures, \$4,642,450

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**ACCEPTANCE BY LESSEE:**

The Proposal & Terms Sheet submitted by Signature Public Funding Corp. on September 13, 2019 has been reviewed, agreed to, and accepted by the City of Moberly, subject to final Board approval.

**AGREED AND ACCEPTED:**

**CITY OF MOBERLY**

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

Name:

Title:

Date:

Option 1 \_\_\_\_\_

Option 2 \_\_\_\_\_

**Option 1**

City of Moberly

Compound Period: Quarterly

Nominal Annual Rate: 2.945%

AMORTIZATION SCHEDULE - Normal Amortization, 360 Day Year

	Date	Payment	Interest	Principal	Balance	Prepayment Price
Loan	10/1/2019				4,642,450.00	
1	11/1/2020	137,751.76	150,361.17	-12,609.41	4,655,059.41	4,748,160.60
2	2/1/2021	137,751.76	34,272.87	103,478.89	4,551,580.52	4,642,612.13
3	5/1/2021	137,751.76	33,511.01	104,240.75	4,447,339.77	4,536,286.57
4	8/1/2021	137,751.76	32,743.54	105,008.22	4,342,331.55	4,429,178.18
5	11/1/2021	137,751.76	31,970.42	105,781.34	4,236,550.21	4,321,281.21
6	2/1/2022	137,751.76	31,191.60	106,560.16	4,129,990.05	4,212,589.85
7	5/1/2022	137,751.76	30,407.05	107,344.71	4,022,645.34	4,103,098.25
8	8/1/2022	137,751.76	29,616.73	108,135.03	3,914,510.31	3,992,800.52
9	11/1/2022	137,751.76	28,820.58	108,931.18	3,805,579.13	3,881,690.71
10	2/1/2023	137,751.76	28,018.58	109,733.18	3,695,845.95	3,769,762.87
11	5/1/2023	137,751.76	27,210.67	110,541.09	3,585,304.86	3,657,010.96
12	8/1/2023	137,751.76	26,396.81	111,354.95	3,473,949.91	3,543,428.91
13	11/1/2023	137,751.76	25,576.96	112,174.80	3,361,775.11	3,395,392.86
14	2/1/2024	137,751.76	24,751.07	113,000.69	3,248,774.42	3,281,262.16
15	5/1/2024	137,751.76	23,919.10	113,832.66	3,134,941.76	3,166,291.18
16	8/1/2024	137,751.76	23,081.01	114,670.75	3,020,271.01	3,050,473.72
17	11/1/2024	137,751.76	22,236.75	115,515.01	2,904,756.00	2,933,803.56
18	2/1/2025	137,751.76	21,386.27	116,365.49	2,788,390.51	2,816,274.42
19	5/1/2025	137,751.76	20,529.53	117,222.23	2,671,168.28	2,697,879.96
20	8/1/2025	137,751.76	19,666.48	118,085.28	2,553,083.00	2,578,613.83
21	11/1/2025	137,751.76	18,797.07	118,954.69	2,434,128.31	2,458,469.59
22	2/1/2026	137,751.76	17,921.27	119,830.49	2,314,297.82	2,337,440.80
23	5/1/2026	137,751.76	17,039.02	120,712.74	2,193,585.08	2,215,520.93
24	8/1/2026	137,751.76	16,150.27	121,601.49	2,071,983.59	2,092,703.43
25	11/1/2026	137,751.76	15,254.98	122,496.78	1,949,486.81	1,968,981.68
26	2/1/2027	137,751.76	14,353.10	123,398.66	1,826,088.15	1,844,349.03
27	5/1/2027	137,751.76	13,444.57	124,307.19	1,701,780.96	1,718,798.77
28	8/1/2027	137,751.76	12,529.36	125,222.40	1,576,558.56	1,592,324.15
29	11/1/2027	137,751.76	11,607.41	126,144.35	1,450,414.21	1,464,918.35
30	2/1/2028	137,751.76	10,678.67	127,073.09	1,323,341.12	1,336,574.53
31	5/1/2028	137,751.76	9,743.10	128,008.66	1,195,332.46	1,207,285.78

32	8/1/2028	137,751.76	8,800.64	128,951.12	1,066,381.34	1,077,045.15
33	11/1/2028	137,751.76	7,851.23	129,900.53	936,480.81	945,845.62
34	2/1/2029	137,751.76	6,894.84	130,856.92	805,623.89	813,680.13
35	5/1/2029	137,751.76	5,931.41	131,820.35	673,803.54	680,541.58
36	8/1/2029	137,751.76	4,960.88	132,790.88	541,012.66	546,422.79
37	11/1/2029	137,751.76	3,983.21	133,768.55	407,244.11	411,316.55
38	2/1/2030	137,751.76	2,998.33	134,753.43	272,490.68	275,215.59
39	5/1/2030	137,751.76	2,006.21	135,745.55	136,745.13	138,112.58
40	8/1/2030	137,751.76	1,006.63	136,745.13	0.00	0.00
Grand Totals		5,510,070.40	867,620.40	4,642,450.00		

Last interest amount decreased by 0.16 due to rounding.



## Option 2

City of Moberly

Compound Period: Quarterly

Nominal Annual Rate: 2.945%

### AMORTIZATION SCHEDULE - Normal Amortization, 360 Day Year

	Date	Payment	Interest	Principal	Balance	Prepayment Price
Loan	10/1/2019				4,642,450.00	
1	11/1/2020	140,750.00	150,361.17	-9,611.17	4,652,061.17	4,745,102.39
2	2/1/2021	140,750.00	34,250.80	106,499.20	4,545,561.97	4,636,473.21
3	5/1/2021	140,750.00	33,466.70	107,283.30	4,438,278.67	4,527,044.24
4	8/1/2021	140,750.00	32,676.83	108,073.17	4,330,205.50	4,416,809.61
5	11/1/2021	140,750.00	31,881.14	108,868.86	4,221,336.64	4,305,763.37
6	2/1/2022	140,750.00	31,079.59	109,670.41	4,111,666.23	4,193,899.55
7	5/1/2022	140,750.00	30,272.14	110,477.86	4,001,188.37	4,081,212.14
8	8/1/2022	140,750.00	29,458.75	111,291.25	3,889,897.12	3,967,695.06
9	11/1/2022	140,750.00	28,639.37	112,110.63	3,777,786.49	3,853,342.22
10	2/1/2023	140,750.00	27,813.95	112,936.05	3,664,850.44	3,738,147.45
11	5/1/2023	140,750.00	26,982.46	113,767.54	3,551,082.90	3,622,104.56
12	8/1/2023	140,750.00	26,144.85	114,605.15	3,436,477.75	3,505,207.31
13	11/1/2023	140,750.00	25,301.07	115,448.93	3,321,028.82	3,354,239.11
14	2/1/2024	140,750.00	24,451.07	116,298.93	3,204,729.89	3,236,777.19
15	5/1/2024	140,750.00	23,594.82	117,155.18	3,087,574.71	3,118,450.46
16	8/1/2024	140,750.00	22,732.27	118,017.73	2,969,556.98	2,999,252.55
17	11/1/2024	140,750.00	21,863.36	118,886.64	2,850,670.34	2,879,177.04
18	2/1/2025	140,750.00	20,988.06	119,761.94	2,730,908.40	2,758,217.48
19	5/1/2025	140,750.00	20,106.31	120,643.69	2,610,264.71	2,636,367.36
20	8/1/2025	140,750.00	19,218.07	121,531.93	2,488,732.78	2,513,620.11
21	11/1/2025	140,750.00	18,323.30	122,426.70	2,366,306.08	2,389,969.14
22	2/1/2026	140,750.00	17,421.93	123,328.07	2,242,978.01	2,265,407.79
23	5/1/2026	140,750.00	16,513.93	124,236.07	2,118,741.94	2,139,929.36
24	8/1/2026	140,750.00	15,599.24	125,150.76	1,993,591.18	2,013,527.09
25	11/1/2026	140,750.00	14,677.82	126,072.18	1,867,519.00	1,886,194.19
26	2/1/2027	140,750.00	13,749.61	127,000.39	1,740,518.61	1,757,923.80
27	5/1/2027	140,750.00	12,814.57	127,935.43	1,612,583.18	1,628,709.01
28	8/1/2027	140,750.00	11,872.64	128,877.36	1,483,705.82	1,498,542.88
29	11/1/2027	140,750.00	10,923.78	129,826.22	1,353,879.60	1,367,418.40
30	2/1/2028	140,750.00	9,967.94	130,782.06	1,223,097.54	1,235,328.52
31	5/1/2028	140,750.00	9,005.06	131,744.94	1,091,352.60	1,102,266.13

32	8/1/2028	140,750.00	8,035.08	132,714.92	958,637.68	968,224.06
33	11/1/2028	140,750.00	7,057.97	133,692.03	824,945.65	833,195.11
34	2/1/2029	140,750.00	6,073.66	134,676.34	690,269.31	697,172.00
35	5/1/2029	140,750.00	5,082.11	135,667.89	554,601.42	560,147.43
36	8/1/2029	140,750.00	4,083.25	136,666.75	417,934.67	422,114.02
37	11/1/2029	140,750.00	3,077.04	137,672.96	280,261.71	283,064.33
38	2/1/2030	140,750.00	2,063.43	138,686.57	141,575.14	142,990.89
39	5/1/2030	142,617.49	1,042.35	141,575.14	0.00	0.00
Grand Totals		5,491,117.49	848,667.49	4,642,450.00		

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**STATEMENT OF QUALIFICATIONS – CITY OF MOBERLY**

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Signature Public Funding Corp. is a wholly owned subsidiary of Signature Bank (“SB”). Our parent is a full-service commercial bank offering a wide variety of business and personal banking products and services. The Bank is ranked among the top 1 percent of commercial banks in the U.S. based on assets and is one of only three banks in the nation to rank in the top 10 in each of the past six years in Forbes annual list of Best and Worst Banks. Investor Relations and Financial Information may all be viewed at [www.signatureny.com](http://www.signatureny.com) and click “Investor Information”.

**Signature Public Funding Corp.** was formed in early 2015 to specialize solely in the providing of tax-exempt financing to obligors in the government and not-for-profit sectors across the United States. The SPFC team has a breadth of experience in the tax-exempt marketplace. Since inception, over \$850MM of transactions have been completed and funded by SPFC/SB. Financings have been provided for rolling stock, computer hardware and software, energy conservation measures and facility improvements, communications equipment, real estate, copiers, and other miscellaneous essential use equipment. SPFC has successfully worked with the end-users, financial advisors, placement agents, and vendors to bring the transactions to a successful close. The financings have been in the form of master equipment lease purchase contracts, revenue pledges and single installment sale contracts.

**Our team includes:**

Don Keough, Sr. Managing Director and head of SPFC. Don has been in the Public Finance arena since 2002. Prior to heading SPFC, Don was in the private practice of law representing a significant number of lenders and lessors in this arena. Don previously ran the operations for SunTrust Equipment Finance & Leasing Corp’s public finance and municipal leasing division.

Rich Cumbers, Sr. Managing Underwriter. Prior to joining SPFC, Rich worked at Bridge Capital Leasing and Capital One Equipment Finance. Prior to that, Rich was the head municipal/public finance underwriter at SunTrust, which is where Rich and Don successfully closed over \$1.2B in public finance transactions on an annual basis.

The remainder of the documentation, credit and sales team at SPFC has a similar breadth of experience and has worked together for over 12 years. Tonia Lee, Sr. Documentation Specialist, Mike Furnari, Sr. Documentation Specialist, and Tracey Galvani, Sr. Credit Officer would also be a part of our team for this transaction.

**Primary Contact:**

Chris Youngs Mitchell – Executive Sales Officer, Signature Public Funding: Chris is an Executive Sales Officer for Signature Public Funding based in Denver, Colorado. Chris is responsible for the origination, structuring and purchase of tax-exempt finance offerings for public-sector essential use assets in the central and western United States. Ms. Youngs has over 30 years’ experience in the tax-exempt finance industry, including both originating and syndicating private placement structures. Prior to joining Signature Public Funding, Ms. Youngs was a SVP for Banc of America Public Capital Corp focusing on the financing of energy-conservation measures and alternative energy sources. Chris has also held positions with Hannon Armstrong Municipal Finance Group, CitiCapital Healthcare and Energy Services Group, and ABN AMRO/LaSalle Bank in the roles of origination, syndication and private placement of tax-exempt obligations.

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**PROPOSAL & TERMS SHEET: REFERENCES**

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**Neosho County Community College**800 W. 14<sup>th</sup> Street

Chanute, KS 66720

Ben Smith, Vice President for Operations

820-432-0301 (office)

[bsmith@neosho.edu](mailto:bsmith@neosho.edu)

June 2017 – Master Lease Purchase Agreement with Escrow to finance energy conservation measures in the amount of \$3,162,044. A payment schedule was established to meet the cash flow needs of the project and the budgetary needs of the College. Closing was facilitated in less than three weeks of notice of award.

**Northwest Kansas Educational Service Center District No. 602**703 W. 2<sup>nd</sup> Avenue

Oakley, KS 67748

Dan Thornton, Executive Director

785-672-3125

[dthornton@nkesc.org](mailto:dthornton@nkesc.org)

May 2018 – Master Lease Purchase Agreement with Escrow to finance energy conservation measures for \$88,436.

**Hutchinson Community College**

1300 N. Plum

Hutchinson, KS 67501

Julie Blanton, Vice President of Finance and Operations

[blantonj@hutchcc.edu](mailto:blantonj@hutchcc.edu)

December 2018 – Tax-exempt lease purchase refunding for \$4,505,000 of previously financed energy conservation measures