

Request for Proposals

 **METRO**
600 NE Grand Ave.
Portland, OR 97232-
2736
(503) 797-1700



METRO

PEOPLE PLACES
OPEN SPACES

RFP #10-1516

WASTE PREVENTION AND RESOURCE CONSERVATION ASSEMBLY

Sustainability Center
600 N.E. Grand Avenue
PORTLAND, OR 97232
(503) 797-1700

Project Manager:
Sara Kirby
Secondary Waste Reduction Educator
(503) 797-1521
sara.kirby@oregonmetro.gov

Procurement Analyst:
Sharon Stiffler
Procurement Analyst
(503) 797-1613
sharon.stiffler@oregonmetro.gov

Notice is hereby given that proposals for RFP 1516 for: Waste Prevention and Resource Conservation Assembly shall be received by Metro, 600 N.E. Grand Avenue, Portland OR 972327 until 3:00 p.m., October 9, 2009. It is the sole responsibility of the proposer to ensure that Metro receives the Proposal by the specified date and time. All late Proposals shall be rejected. PROPOSERS SHALL REVIEW ALL INSTRUCTIONS AND CONTRACT TERMS AND CONDITIONS.

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FOR

Waste Prevention and Resource Conservation Assembly Program

I. INTRODUCTION

The Sustainability Center of Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 NE Grand Avenue, Portland, OR 97232-2736, is requesting proposals from professional performers who are able to develop, schedule and perform all-school assembly programs for middle schools within Multnomah, Clackamas and Washington counties. The production will be contracted for three years, dependant on annual budget authorization by Metro Council.

Proposals will be due no later than 3:00 p.m., October 9, 2009, in Metro's business offices at 600 NE Grand Avenue, Portland, OR 97232-2736. Details concerning the project and proposal are contained in this document.

II. BACKGROUND/HISTORY OF PROJECT

Metro provides free classroom presentations and educational materials about preventing waste, recycling, composting and household hazardous waste to metro-area elementary, middle and high schools. Our programs engage students in multisensory activities and give them the tools to think critically about how choices impact our lives, resources and the future.

The goal of the assembly program is to reinforce to middle school students the idea that the choices they make everyday have an impact on the environment. At the end of the show students should understand the connection between excessive consumerism and our growing waste problems, as well as the impact our individual behaviors have on diminishing natural resources. They should come away with concrete ideas of what they can do to have a positive impact on the environment by creating less waste and the motivation to put their ideas into action at home and at school.

Metro is open to proposals that may include storytelling, theater, music, magic or other dramatic mediums that will capture the attention of up to 500 students at a time to convey the waste reduction message. The successful applicant will design the program, but will have the support of Metro's waste reduction education staff to ensure the waste reduction messages are delivered clearly in an appropriate and accurate fashion.

This assembly will complement other Metro programs currently being offered to schools including classroom presentations. Descriptions of these programs can be found on Metro's website: www.oregonmetro.gov/schoolrecycling.

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III. PROPOSED SCOPE OF WORK/SCHEDULE

Metro is seeking proposals from qualified firms to perform the following services and to deliver the products described:

General Considerations

1. Upon award of the contract, contractor will meet with Metro representative to discuss project development, strategy and timelines. Contractor will also meet with Metro representative on mutually agreed upon intervals/key development phases for review, comment and approval on the work in progress.

2. Standard Metro contracts require that Metro will own in its entirety all products, including, but not limited to: props, costumes, sets, script, characters, original music, jingles, etc. created by the Contractor for this assembly. Contractor retains no creative or artistic rights to any of the work. However, Metro will consider proposals with alternative arrangements other than full Metro ownership of all products and artistic rights for programs that have already been developed and performed elsewhere.
 - a. Contractor will describe in detail the requested alternative arrangements to ownership in the proposal that is submitted to Metro.
 - b. It is expected that these changes to standard Metro contract procedures for programs that are already developed and/or alternative ownership arrangements will be reflected in lower development costs.

3. This is a multiyear project with all development of the assembly program to be completed by March 19, 2010.

4. Within one month from the conclusion of the performance season each year, the Contractor will write and submit to Metro a summary of the assembly, including but not restricted to:
 - a. Names of schools and contact teachers
 - b. Numbers of students and teachers receiving assembly at each school
 - c. Compilation of evaluations from teachers
 - d. Photos of assembly program (digital or original)
 - e. Suggestions for improving future assemblies.

Program Development

1. Contractor will develop a script for an all-school assembly program to be performed in middle schools (gymnasiums, auditoriums, cafeterias) that is appropriate for students in grades 6-8, is approximately 30-35 minutes in duration, and addresses the goals/concepts described in the background information of this RFP.
 - Optional component to be considered: Metro has found that having actors conduct post-performance, follow-up 'Talk Back' discussions in classrooms helps reinforce the messages of the performance and

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enhances student understanding. Contractor will be responsible for scheduling actor-led Talk Back sessions (up to 30 minutes in length) at participating schools to occur on the same day as the performance. Metro will be responsible for the structure of these sessions as well as actor training on discussion content and classroom presentation techniques.

2. Contractor will create/provide/maintain all props, costumes, sets, stages, sound systems, etc. necessary for program.

Performances

1. Contractor will perform (or cause to be performed) the assembly program to 20 schools the first year and 40 schools in each of the subsequent years in the Portland metropolitan area with a goal of reaching 30,000 students over a three-year period.

2. In the first year, Contractor will schedule the assembly program with school representatives with target audiences of 10 schools in Portland/East Multnomah County, 5 schools in Washington County, and 5 schools in Clackamas County. In the two subsequent years, Contractor will schedule 20 schools in Portland/East Multnomah County, 10 schools in Washington County, and 10 schools in Clackamas County. Metro will provide contractor with a list of target schools each year.

3. The Contractor will provide Metro with a list of the performance schedule prior to the assemblies.

4. Contractor will distribute follow-up materials and program evaluations to teachers/students. Metro and the Contractor will work together to develop the materials. (Cost for printing follow-up materials are not included in this proposal and will be covered by Metro)

IV. QUALIFICATIONS/EXPERIENCE

Proposers shall have the following experience:

- (1) Knowledge of 6th-8th grade audiences (attention span, level of understanding, etc).
- (2) Developing creative, engaging scripts for school performances.
- (3) Creating appropriate props, costumes, stages, etc. as required by script.
- (4) Providing performances for audiences of 100-500 middle school students and teachers.
- (5) Organizational ability to schedule presentations and collect data for summary.

V. PROJECT ADMINISTRATION

Metro's assembly program project will be administered by Metro's Resource Conservation and Recycling division's public outreach and education section. Project management and direction will come from Sara Kirby, secondary waste reduction educator.

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VI. PROPOSAL INSTRUCTIONS

A. Submission of Proposals

Three hard copies and one electronic copy of the proposal shall be furnished to Metro, addressed to:

Metro Procurement Office
Sharon Stiffler, Procurement Analyst
600 NE Grand Avenue
Portland, OR 97232-2736
sharon.stiffler@oregonmetro.gov

B. Deadline

Proposals will not be considered if received after 3:00 p.m., October 9th, 2009.

C. RFP as Basis for Proposals:

This Request for Proposals represents the most definitive statement Metro will make concerning the information upon which Proposals are to be based. Any verbal information which is not addressed in this RFP will not be considered by Metro in evaluating the Proposal. All questions relating to this RFP should be addressed to Sharon Stiffler at (503) 797-1613 or sharon.stiffler@oregonmetro.gov. Any questions, which in the opinion of Metro, warrant a written reply or RFP amendment will be furnished to all parties receiving this RFP. Metro will not respond to questions received after 3:00 p.m. September 30th, 2009.

D. Information Release

All Proposers are hereby advised that Metro may solicit and secure background information based upon the information, including references, provided in response to this RFP. By submission of a proposal all Proposers agree to such activity and release Metro from all claims arising from such activity. In Accordance with Oregon Public Records Law (ORS 192), proposals submitted will be considered part of the public record, except to the extent they are exempted from disclosure.

E. Minority, Women and Emerging Small Business Program

In the event that any subcontracts are to be utilized in the performance of this agreement, the Proposer's attention is directed to Metro Code provisions 2.04.100, which encourages the use of minority, women and emerging small businesses (MWESB) to the maximum extent practical. Copies of these MWESB requirements are available from the Metro Procurement Office, 600 NE Grand Avenue Portland, OR 97232, (503) 797-1816.

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VII. PROPOSAL CONTENTS

The proposal should contain not more than 6 pages of written material (excluding biographies and brochures, which may be included in an appendix), describing the ability of the consultant to perform the work requested, as outlined below. The proposal should be submitted on recyclable, double-sided recycled paper (post consumer content). No waxed page dividers or non-recyclable materials should be included in the proposal.

- A. Transmittal Letter: Indicate who will be assigned to the project, who will be project manager, and that the proposal will be valid for ninety (90) days.

- B. Approach/Project Work Plan: Describe how the work will be done within the given time-frame and budget. Include a proposed work plan and schedule. Include proposals and programs/budget for either:
 - 1. An all-school (grades 6-8) assembly, and/or
 - 2. An all-school (grades 6-8) assembly with the addition of 30 minute, actor-led Talk Back sessions held on the same day. Contractor is responsible for scheduling and conducting Talk Back sessions, Metro is responsible for content and structure of the sessions.

- C. Staffing/Project Manager Designation: Identify specific personnel assigned to major project tasks, their roles in relation to the work required, percent of their time on the project, and special qualifications they may bring to the project. Include resumes of individuals proposed for this contract.

Metro intends to award this contract to a single firm to provide the services required. Proposals must identify a single person as project manager to work with Metro. The consultant must assure responsibility for any subconsultant work and shall be responsible for the day-today direction and internal management of the consultant effort.

- D. Experience: Indicate how your firm meets the experience requirements listed in section IV. of this RFP. List projects conducted over the past five years which involved services similar to the services required here. For each of these other projects, include the name of the customer contact person, his/her title, role on the project, and telephone number. Identify persons on the proposed project team who worked on each of the other projects listed, and their respective roles.

- E. Cost/Budget: Present the proposed cost of the project and the proposed method of compensation. List hourly rates for personnel assigned to the project, total personnel expenditures, support services, and subconsultant fees (if any). Requested expenses should also be listed.

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- F. Exceptions and Comments: To facilitate evaluation of proposals, all responding firms will adhere to the format outlined within this RFP. Firms wishing to take exception to, or comment on, any specified criteria within this RFP or attached standard personal services agreement are encouraged to document their concerns in this part of their proposal. Exceptions or comments should be succinct, thorough and organized.

VIII. GENERAL PROPOSAL/CONTRACT CONDITIONS

- A. Limitation and Award: This RFP does not commit Metro to the award of a contract, nor to pay any costs incurred in the preparation and submission of proposals in anticipation of a contract. Metro reserves the right to waive minor irregularities, accept or reject any or all proposals received as the result of this request, negotiate with all qualified sources, or to cancel all or part of this RFP.
- B. Billing Procedures: Proposers are informed that the billing procedures of the selected firm are subject to the review and prior approval of Metro before reimbursement of services can occur. Contractor's invoices shall include an itemized statement of the work done during the billing period, and will not be submitted more frequently than once a month. Metro shall pay Contractor within 30 days of receipt of an approved invoice.
- C. Validity Period and Authority: The proposal shall be considered valid for a period of at least ninety (90) days and shall contain a statement to that effect. The proposal shall contain the name, title, address, and telephone number of an individual or individuals with authority to bind any company contacted during the period in which Metro is evaluating the proposal.
- D. Conflict of Interest. A Proposer filing a proposal thereby certifies that no officer, agent, or employee of Metro or Metro has a pecuniary interest in this proposal or has participated in contract negotiations on behalf of Metro; that the proposal is made in good faith without fraud, collusion, or connection of any kind with any other Proposer for the same call for proposals; the Proposer is competing solely in its own behalf without connection with, or obligation to, any undisclosed person or firm.
- E. Equal Employment and Nondiscrimination Clause Metro and its contractors will not discriminate against any person(s), employee or applicant for employment based on race, color, religion, sex, national origin, age, marital status, familial status, gender identity, sexual orientation, disability for which a reasonable accommodation can be made, or any other status protected by law. Metro fully complies with Title VI of the

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Civil Rights Act of 1964 and related statutes and regulations in all programs and activities. For more information, or to obtain a Title VI Complaint Form, see www.oregonmetro.gov.

- F. Intergovernmental Cooperative Agreement (Requires competitive solicitation) – Pursuant to ORS 279A and the Metro public contract code, Metro participates in an Intergovernmental Cooperative Purchasing program by which other public agencies shall have the ability to purchase the goods and services under the terms and conditions of this awarded contract. Any such purchases shall be between the Contractor and the participating public agency and shall not impact the Contractor's obligation to Metro under this agreement. Any estimated purchase volumes listed herein do not include volumes for other public agencies, and Metro makes no guarantee as to their participation in any purchase. Any bidder may decline to extend the prices and terms of this solicitation to any or all other public agencies upon execution of this contract. Unless the bidder specifically declines to participate in the program by marking the box on the contract declining to participate, the bidder agrees to participate in the Intergovernmental Cooperative Purchasing program.

IX. EVALUATION OF PROPOSALS

- A. Evaluation Procedure: Proposals received that conform to the proposal instructions will be evaluated. The evaluation will take place using the evaluation criteria identified in the following section. Interviews may be requested prior to final selection of one firm.
- B. Evaluation Criteria: This section provides a description of the criteria which will be used in the evaluation of the proposals submitted to accomplish the work defined in the RFP.

	Percentage of Total Score
Project Work Plan/Approach	35%
1. Demonstration of understanding of the project objectives	
▪ Approach reflects understanding of resource conservation, natural resources, waste prevention	
▪ Metro goals and objectives would be met using this plan	
2. Performance methodology	
▪ Appropriate format/content/storyline for 6th-8th grade audience	
▪ Appropriate format for all-school assembly	
▪ Approach is creative and engaging	

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Project Staffing Experience 35%

1. Project consultant
 - Demonstrates successful past experiences that are similar in nature to this project
 - Personal commitment to waste reduction and recycling
 - Ability to complete project within the time allowed
2. Commitment to project
 - Shows strong interest in the project
 - Willingness to work with Metro in developing assembly program & follow-up materials

Budget/Cost Proposal 30%

1. Projected cost/benefit of proposed work plan/approach
 - Reasonable overall cost/child for development and performances
 - Costs reflect description of work plan/approach
2. Commitment to budget and schedule parameters
 - Staff and materials expenses are described in detail

100%

X. APPEAL OF CONTRACT AWARD

Aggrieved proposers who wish to appeal the award of this contract must do so in writing within seven (7) days of issuance of the notice of intent to award by Metro. Appeals must be submitted to Darin Matthews, Procurement Officer, 600 NE Grand, Portland, Oregon 97232 and must state the specific deviation of rule or statute in the contract award. Metro will issue a written response to the appeal in a timely manner.

XI. NOTICE TO ALL PROPOSERS -- STANDARD AGREEMENT

The attached personal services agreement is a standard agreement approved for use by the Office of Metro Attorney. This is the contract the successful Proposer will enter into with Metro; it is included for your review prior to submitting a proposal.

Sample Personal Service Agreement

Contract # _____

THIS AGREEMENT is between Metro, a metropolitan service district organized under the laws of the State of Oregon and the Metro Charter, located at 600 N.E. Grand Avenue, Portland, OR 97232-2736, and _____, referred to herein as "Contractor," located at _____.

In exchange for the promises and other consideration set forth below, the parties agree as follows:

1. **Duration.** This personal services agreement shall be effective _____ and shall remain in effect until and including _____, unless terminated or extended as provided in this Agreement.

2. **Scope of Work.** Contractor shall provide all services and materials specified in the attached "Exhibit A -- Scope of Work," which is incorporated into this Agreement by reference. All services and materials shall be provided by Contractor in accordance with the Scope of Work, in a competent and professional manner. To the extent that the Scope of Work contains additional contract provisions or waives any provision in the body of this Agreement, the Scope of Work shall control.

3. **Payment.** Metro shall pay Contractor for services performed and materials delivered in the amount(s), manner and at the time(s) specified in the Scope of Work for a maximum sum not to exceed _____ AND _____/100THS DOLLARS (\$ _____).

4. **Insurance.**

a. Contractor shall purchase and maintain at the Contractor's expense, the following types of insurance, covering the Contractor, its employees, and agents:

(1) Broad form comprehensive general liability insurance covering bodily injury and property damage, with automatic coverage for premises, operations, and product liability, shall be a minimum of \$1,000,000 per occurrence. The policy must be endorsed with contractual liability coverage; and

(2) automobile bodily injury and property damage liability insurance coverage shall be a minimum of 1,000,000 per occurrence.

b. Metro, its elected officials, departments, employees, and agents shall be named as ADDITIONAL INSUREDS. Notice of any material change or policy cancellation shall be provided to Metro 30 days prior to the change or cancellation.

c. Contractor, its subcontractors, if any, and all employers working under this Agreement that are subject employers under the Oregon Workers' Compensation Law shall comply with ORS 656.017, which requires them to provide Workers' Compensation coverage for all their subject workers. Contractor shall provide Metro with certification of Workers' Compensation insurance including employer's liability. If Contractor has no employees and will perform the work without the assistance of others, a certificate to that effect may be attached, as Exhibit B, in lieu of the certificate showing current Workers' Compensation.

d. If required by the Scope of Work, Contractor shall maintain for the duration of this Agreement professional liability insurance covering personal injury and property damage arising from errors, omissions, or malpractice. Coverage shall be in the minimum amount of \$500,000. Contractor shall provide to Metro a certificate of this insurance, and 30 days' advance notice of material change or cancellation.

e. Contractor shall provide Metro with a Certificate of Insurance complying with this article, and naming Metro as an additional insured within fifteen (15) days of execution of this contract, or twenty-four (24) hours before services under this contract commence, whichever date is earlier.

5. **Indemnification.** Contractor shall indemnify and hold Metro, its agents, employees and elected officials harmless from any and all claims, demands, damages, actions, losses and expenses, including attorney's fees, arising out of or in

Sample Personal Service Agreement

any way connected with its performance of this Agreement, or with any patent infringement or copyright claims arising out of the use of Contractor's designs or other materials by Metro and for any claims or disputes involving subcontractors.

6. Ownership of Documents and Maintenance of Records. Unless otherwise provided herein, all documents, instruments and media of any nature produced by Contractor pursuant to this agreement are Work Products and are the property of Metro, including but not limited to: drawings, specifications, reports, scientific or theoretical modeling, electronic media, computer software created or altered specifically for the purpose of completing the Scope of Work, works of art and photographs. Unless otherwise provided herein, upon Metro request, Contractor shall promptly provide Metro with an electronic version of all Work Products that have been produced or recorded in electronic media. Metro and Contractor agree that all work Products are works made for hire and Contractor hereby conveys, transfers, and grants to Metro all rights of reproduction and the copyright to all such Work Products.

- a. Contractor and subcontractors shall maintain all fiscal records relating to such contracts in accordance with generally accepted accounting principles. In addition, Contractor and subcontractors shall maintain any other records necessary to clearly document:
 - (1) The performance of the contractor, including but not limited to the contractor's compliance with contract plans and specifications, compliance with fair contracting and employment programs, compliance with Oregon law on the payment of wages and accelerated payment provisions; and compliance with any and all requirements imposed on the contractor or subcontractor under the terms of the contract or subcontract;
 - (2) Any claims arising from or relating to the performance of the contractor or subcontractor under a public contract;
 - (3) Any cost and pricing data relating to the contract; and
 - (4) Payments made to all suppliers and subcontractors.
- b. Contractor and subcontractors shall maintain records for the longer period of (a.) six years from the date of final completion of the contract to which the records relate or (b.) until the conclusion of any audit, controversy or litigation arising out of or related to the contract.
- c. Contractor and subcontractors shall make records available to Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, within the boundaries of the Metro region, at reasonable times and places regardless of whether litigation has been filed on any claims. If the records are not made available within the boundaries of Metro, the Contractor or subcontractor agrees to bear all of the costs for Metro employees, and any necessary consultants hired by Metro, including but not limited to the costs of travel, per diem sums, salary, and any other expenses that Metro incurs, in sending its employees or consultants to examine, audit, inspect, and copy those records. If the Contractor elects to have such records outside these boundaries, the costs paid by the Contractor to Metro for inspection, auditing, examining and copying those records shall not be recoverable costs in any legal proceeding.
- d. Contractor and subcontractors authorize and permit Metro and its authorized representatives, including but not limited to the staff of any Metro department and the staff of the Metro Auditor, to inspect, examine, copy and audit the books and records of Contractor or subcontractor, including tax returns, financial statements, other financial documents and any documents that may be placed in escrow according to any contract requirements. Metro shall keep any such documents confidential to the extent permitted by Oregon law, subject to the provisions of section E.
- e. Contractor and subcontractors agree to disclose the records requested by Metro and agree to the admission of such records as evidence in any proceeding between Metro and the Contractor or subcontractor, including, but not limited to, a court proceeding, arbitration, mediation or other alternative dispute resolution process.
- f. Contractor and subcontractors agree that in the event such records disclose that Metro is owed any sum of money or establish that any portion of any claim made against Metro is not warranted, the Contractor or subcontractor shall pay all costs incurred by Metro in conducting the audit and inspection. Such costs may be withheld from any sum that is due or that becomes due from Metro.

Sample Personal Service Agreement

g. Failure of the Contractor or subcontractor to keep or disclose records as required by this document or any solicitation document may result in debarment as a bidder or proposer for future Metro contracts as provided in ORS 279B.130 and Metro Code Section 2.04.070(c), or may result in a finding that the Contractor or subcontractor is not a responsible bidder or proposer as provided in ORS 279B.110 and Metro Code Section 2.04.052.

7. Project Information. Contractor shall share all project information and fully cooperate with Metro, informing Metro of all aspects of the project including actual or potential problems or defects. Contractor shall abstain from releasing any information or project news without the prior and specific written approval of Metro.

8. Independent Contractor Status. Contractor shall be an independent contractor for all purposes and shall be entitled only to the compensation provided for in this Agreement. Under no circumstances shall Contractor be considered an employee of Metro. Contractor shall provide all tools or equipment necessary to carry out this Agreement, and shall exercise complete control in achieving the results specified in the Scope of Work. Contractor is solely responsible for its performance under this Agreement and the quality of its work; for obtaining and maintaining all licenses and certifications necessary to carry out this Agreement; for payment of any fees, taxes, royalties, or other expenses necessary to complete the work except as otherwise specified in the Scope of Work; and for meeting all other requirements of law in carrying out this Agreement. Contractor shall identify and certify tax status and identification number through execution of IRS form W-9 prior to submitting any request for payment to Metro.

9. Right to Withhold Payments. Metro shall have the right to withhold from payments due to Contractor such sums as necessary, in Metro's sole opinion, to protect Metro against any loss, damage, or claim which may result from Contractor's performance or failure to perform under this Agreement or the failure of Contractor to make proper payment to any suppliers or subcontractors.

10. State and Federal Law Constraints. Both parties shall comply with the public contracting provisions of ORS chapters 279A, 279B and 279C, and the recycling provisions of ORS 279B.025 to the extent those provisions apply to this Agreement. All such provisions required to be included in this Agreement are incorporated herein by reference. Contractor shall comply with all applicable requirements of federal and state civil rights and rehabilitation statutes, rules and regulations including those of the Americans with Disabilities Act.

11. Situs. The situs of this Agreement is Portland, Oregon. Any litigation over this agreement shall be governed by the laws of the State of Oregon and shall be conducted in the Circuit Court of the state of Oregon for Multnomah County, or, if jurisdiction is proper, in the U.S. District Court for the District of Oregon.

12. Assignment. This Agreement is binding on each party, its successors, assigns, and legal representatives and may not, under any circumstance, be assigned or transferred by either party.

13. Termination. This Agreement may be terminated by mutual consent of the parties. In addition, Metro may terminate this Agreement by giving Contractor seven days prior written notice of intent to terminate, without waiving any claims or remedies it may have against Contractor. Termination shall not excuse payment for expenses properly incurred prior to notice of termination, but neither party shall be liable for indirect or consequential damages arising from termination under this section.

14. No Waiver of Claims. The failure to enforce any provision of this Agreement shall not constitute a waiver by Metro of that or any other provision.



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Sample Personal Service Agreement

15. Modification. Notwithstanding and succeeding any and all prior agreement(s) or practice(s), this Agreement constitutes the entire Agreement between the parties, and may only be expressly modified in writing(s), signed by both parties.

By _____
Title _____
Date _____

METRO
By _____
Title _____
Date _____