

October 18, 2021

*RFQ Response from:*



4678 Isabelle Street  
Eugene, OR 97402  
Phone (541) 359-3755  
Fax (541) 982-2266

*Regarding:*

City of Carlton  
Request for Qualifications (RFQ)  
Integrator of Record

October 18, 2021

City of Carlton  
ATTENTION: City Manager  
191 E. Main Street  
Carlton, Oregon 97111

**RE: City of Carlton “STATEMENT OF QUALIFICATIONS FOR INTEGRATOR OF RECORD”**

Contact: Gary Jenks  
Address: 4678 Isabelle St, Eugene OR 97402  
Phone: 541-912-3766  
Email: [gjenks@tag-inc.us](mailto:gjenks@tag-inc.us)  
Addendums Received: None

The Automation Group (TAG) is a products and services company that has been in the business for over 15 years and is located in Eugene, Oregon. Capabilities include in-house UL508a/UL698a panel shop, Allen Bradley and GE Systems Integrator status, field technicians having experience in water, wastewater, and pump station start-up and commissioning, and Project Management systems in place to ensure a successful project. TAG is a recognized systems integrator with multiple manufactures as well as a representative for products such as Endress + Hauser, Hach (Analytical Instruments), Cattron (Autodialers – Formerly Antx), Walchem (Metering Pumps), and in house products produces by TAG including the RA-1100 MTU/RTU, Cellular Dialer Systems, Mobile Monitoring System for external Plant Control and chemical feed systems. Our Electricians have programming knowledge and can help provide support. TAG has a team of inhouse Electrical Designers for Electrical, SCADA/PLC Systems and Control Panels and can provide Certified Startup for VFD Systems and Flow/Level Instrumentation. TAG can also provide Instrument Calibration to meet State and Local Requirements for Certification/Verification.

TAG has a solid reputation in working in such environments through the projects that it has completed. The mission statement of The Automation Group is to *be The Recognized Leader in providing the most innovative Software Development, Control Systems and Instrumentation Solutions for Mission Critical Systems addressing Water & Wastewater Treatment, Energy Management, and Public Utility Applications. We strive to consistently exceed our customer’s expectations.*

TAG has a Secondary Company, Delta Environmental that provides Certified State Reporting and Pump Maintenance for Customers that do not employ operators for Wastewater applications. Delta has Level 1 & 2 Operators on staff.

Our Primary Branch is located in Eugene, Oregon with a smaller office in Salem, and local support from our Portland and Heppner satellite offices. We have 34 employees on staff in the Northwest

The Automation Group is an Equal Opportunity Employer. In order to provide equitable employment and advancement opportunities to all employees, TAG takes into account the following: merit, past performance, qualifications, attitude, abilities, and other similar factors as determined by management. Our policy is to grant equitable employment opportunities to all qualified persons. It is against our policy to discriminate against any employee or applicant on the basis of race, religion, color, age, sex, pregnancy, national origin, veteran status, disability marital status, sexual orientation, or any other classification protected by federal, state, and local laws per TAG’s company handbook.

The Automation Group has no conflicts of interest within the jurisdictional boundaries of the City of Carlton.

Thank you for the Opportunity to present this Professional Services Integrator of Record Proposal.  
Sincerely,



Gary Jenks  
President/Owner  
gjenks@tag-inc.us

The Automation Group [TAG] is pleased to provide past work experience and references. We work with Owners and General Contractors to provide the best quality of work possible to help build and maintain long term relationships with our customers. Our contract administration makes sure that all contracts and insurance requirements are executed prior to performing any work. TAG makes every effort stay within budget with minimal change orders as possible. TAG strides to meet their schedule and project needs. We can also provide 24/7 emergency support.

### **City of Hermiston**

TAG has supplied and installed new PLCs, Operator interface terminals, Radios, misc. equipment and provided programming for the City of Hermiston, Oregon. TAG is currently servicing the City of Hermiston.

PLC and Radio Upgrade  
Roy Bicknell  
Water Superintendent  
180 NE 2nd  
Hermiston, OR 97838  
541-561-7607

### **City of Condon**

We have worked for the city for 2 Years and provide SCADA/HMI Services, instrumentation and telemetry services. We have been involved with upgrading the SCADA system, and are currently involved in upgrading the Intake system. We are currently the city's "System Integrator of Record".

SCADA and PLC Upgrade  
Gibb Wilkins  
Public Works Superintendent  
128 S. Main St.  
Condon OR, 97823  
541-384-2711

### **City of Veneta**

We have worked with the city for 18 Years and provide SCADA/HMI Services, instrumentation and telemetry services including 4 well sites, 3 Reservoirs, pump stations and a Water Plant. Over the years we have been involved with all aspects of construction for the water system with new reservoirs, wells, a new treatment plant and provide remote connections for the operators. We are currently the city's "System Integrator of Record".

Jack Kelly Pump Station  
Kyle Schauer  
Public Works Director  
PO Box 458  
Veneta, Oregon 97487  
541-935-2191

### **City of Junction City**

We have worked for the city for 10 Years and provide SCADA/HMI Services, instrumentation and telemetry services including 5 well sites, 3 Reservoirs, and a Water Plant. Over the years we have been involved with all aspects of construction for the water system with new elevated reservoirs, wells, new treatment plant and remote connections for the operators. We are currently the city's "System Integrator of Record".

New Filter System  
Jason Knope  
Public Works Director  
1171 Elm St.  
Junction City, OR 97448  
(541)998-4761

### **City of Bandon**

We have worked for the city for 18 Years and provide SCADA/HMI Services, instrumentation and telemetry services including 2 intakes, and 1 reservoir. Over the last 18 years we have been involved with upgrading the SCADA system, new UV and provide remote connections for the operators. We are currently the city's "System Integrator of Record".

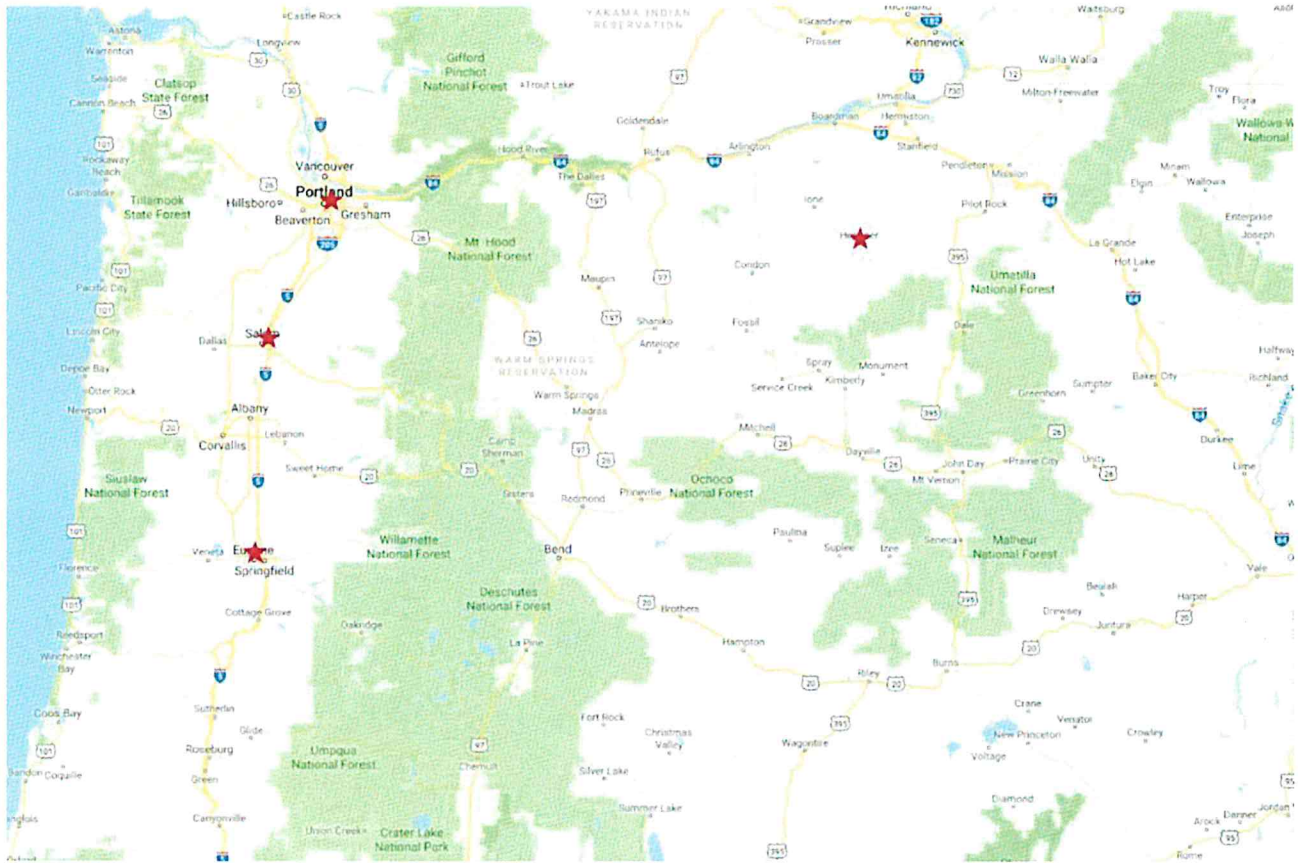
Instrumentation & SCADA Upgrade  
Bill Nielson  
Plant Supervisor  
PO Box 67  
Bandon, OR 97411  
541-347-9122

### **City of Cottage Grove**

We have worked for the city for 18 Years and provide SCADA/HMI Services, instrumentation and telemetry services including 1 intake, 5 Pump Stations and 3 reservoirs. Over the last 18 years we have been involved with upgrading the SCADA system, and are currently involved in the new filter train and provide remote connections for the operators. We are currently the city's "System Integrator of Record".

New Pump Stations  
Ray Pardee  
Water Production Superintendent  
3300 Row River Road  
Cottage Grove, OR 97424  
541-942-7094





TAG has worked directly with Engineering Firms and Owners to specify and design all parts of Water & Wastewater Systems and implementation phases utilizing our staff from any of our locations in Oregon.

Our Local onsite support for the Owner will be located in Salem, Oregon with support from our Portland Integrator as well as our Eugene office. Salem is located roughly 30 miles from Carlton. TAG is available 24/7 for emergency services and phone technical support. Panels will be built in our Eugene UL508a/698a Panel Shop

TAG Currently Supports over 75 Water/Wastewater sites in Oregon.

## City of Carlton: Understanding and Approach

TAG has serviced many facets of the City of Carlton Water and Wastewater SCADA systems since 2013. The scope of support by TAG has encompassed simple troubleshooting tasks, emergency responses to system failures, programming modifications, and improvement projects and upgrades. Specific instances of TAG support of Carlton Water and Wastewater systems are listed below:

- Grant Street Lift Station SCADA system
- Hawn Creek Lift Station alarm dialer
- Upgrades to the Concrete Reservoir instrumentation and controls
- MWL Intertie control integration at the Water Plant
- Water Plant SCADA computer upgrade
- Water Plant PLC and SCADA program modifications and troubleshooting
- Instrumentation replacement at the New Reservoir
- Installation of secure remote access to the Water Plant for Public Works employees and TAG remote support
- 24/7 emergency response to issues with SCADA and control systems

TAG technicians are familiar with both the water and wastewater systems in the City, understand the current age and conditions of the automation equipment, and are able to make recommendations to ensure that the systems continue to operate reliably in the future. Several TAG technicians are also licensed electricians and have instrumentation experience. This enables an even greater depth of troubleshooting and resolution of control issues.

Recently TAG has recommended specific upgrades to the Water Plant control system and to the communication network between the Water Plant and the reservoir sites. These recommendations will bring legacy control hardware up to date, increase reliability of the control system, provide a solid communication network between all water system sites, and allow operators to view all sites and make better informed control changes.

In addition to gaining knowledge of the City's control systems since 2013, TAG technicians have also built working relationships with the Public Works team and collaborate together to address current and future needs. As a company TAG hopes to continue this relationship and build on the investment that has been made.

## TAG Ancillary Support Services

### **TAG has Engineers and CAD Drafters Located at our Eugene Facility.**

- Daren Dawson
- Joel Judd
- CJ Connelly
- Bryce Jenks
- Gary Jenks

### **Providing UL listed control system cabinets**

- TAG has a UL Panel Shop located in Eugene, Oregon
  - Listing for 508a for standard control panels
  - Listing for 698a for Hazardous Location

### **Providing mobile device access to system information**

- TAG offers a “Mobile Monitoring System” for customers to login to their facility SCADA system that will give them the ability to do anything just like they are sitting at the Plant.
  - Cisco VPN for Complex Systems
  - TosiBox for Simple Systems
- Support for the following devices
  - Windows Laptop or desktop
  - IOS
    - iPhone
    - iPad
  - Android
    - Any Android phones
    - Any Android tablets

### **Providing SCADA system computer support**

- All of TAGs Programmers/Techs are capable of supporting computer systems
- TAG is a Rockwell Certified Systems Integrator but can support any of the below Primary SCADA Systems
  - Rockwell/Allen Bradley
  - Wonderware
  - Inductive Automation
  - iFix
  - Cimplicity
  - And others



### **Servicing of automatic hydraulic control valves**

- TAG works with the following manufactures for valves
  - Bray
  - Roto torque
  - EIM
  - Auma

### **Servicing and installation of pressure transducers, Flow Meters, Level Transducers and many others.**

- TAG can provide, install and calibrate most any instrumentation device
  - Endress & Hauser – TAG is the West Coast E&H Factory Provider and can provide a 3-year warranty with every device and can perform Certified Factory Startup
  - Rosemount
  - Neptune
  - Dwyer
  - Siemens
  - Dayton
  - And many more

### **Programming, adjusting operations, and/or servicing backup power generators**

- TAG can provide integration to all Generator Systems and Transfer Switches.
- TAG works with the following Generator system Manufactures
  - Caterpillar
  - Kohler
  - Onan
  - MTU
  - Generac

### **Programmable Logic Controllers (PLC)**

- TAG is a certified System Integrator for the following
  - Allen Bradley
- TAG can program many PLCs, below is a list of a few manufactures
  - Modicon
  - Automation Direct
  - ScadaPack
  - GE
  - Siemens
  - Omron

### **Variable Frequency Drives (VFD)**

- TAG can provide Certified Startup and Programming for the following drives and extend the warranty
  - Allen Bradley
  - ABB
  - Cutler Hammer
- TAG can also program other drives as listed below and many more
  - Square D
  - Siemens
  - Yaskawa
  - Automation Direct
  - GE
  - And many more

### **Radio Systems**

- TAG is a Distributer for CalAmp for the Pacific NW
- TAG can perform Radio Studies

### **Analytical Instrumentation**

- TAG works with the following Manufactures
  - Hach
  - Chemtrac
  - Rosemount
  - And others

## ***The Automation Group*** **KEY STAFF & TEAM RESUMES**

- Gary Jenks – Owner & Lead Integrator
- Tim Boyd – Lead Integrator
- Richard Jobe – Assistant Integrator
- Dustin Perket – Assistant Integrator
- Justin Heide – HMI Systems Integrator/Graphic Design
- Daren Dawson – Design Engineer

### *Project Personnel:*

Integrator Project Lead – See resumes in other area

- Gary Jenks – Lead Project Integrator
  - Certified in VFD Startup
  - Oregon Electrical Journeyman Lic
  - PLC/HMI/SCADA Programming, Telemetry, Instrumentation, Process Control
  - Certified Integrator
- Tim Boyd – Lead Project Integrator
  - Certified in VFD Startup
  - Oregon Electrical Journeyman Lic
  - General Supervising Electrician
  - PLC/HMI/SCADA Programming, Telemetry, Instrumentation, Process Control
  - Certified Integrator
  - Radio Specialist
- Rick Jobe
  - PLC/HMI/SCADA Programming, Telemetry, Instrumentation, Process Control
- Dustin Perket
  - PLC/HMI/SCADA Programming, Telemetry, Instrumentation, Process Control
  - PLC
- Justin Heide
  - SCADA/HMI Specialist
  - Graphics Design
- Daren Dawson
  - Electrical Engineer – OSU Graduate

# Gary Jenks

## President of The Automation Group

### Experience

2006 - PRESENT      The Automation Group, Inc.      Eugene, OR

#### President

- PLC/HMI Programming
- Factory Authorized AF Drive Start-up
- Project Start-up and commissioning

2001 - 2006      LH Morris Electric, Inc.      Springfield, OR

#### Controls Division Manager

- PLC/HMI Programming
- Factory Authorized AF Drive Start-up
- Project Start-up and commissioning
- Responsible for the Daily operations of the Controls Division

1995 - 2001      NW Industrial Electric      Springfield, OR

#### Project Manager/Foreman

- PLC/HMI Programming
- AF Drive Start-up
- Project Start-up and commissioning
- Electrical Installations

1990 - 1995      Emerald Industrial Electric      Springfield, OR

#### Foreman

- PLC/HMI Programming
- Electrical Installations

### Education

1990 - 1993 BOLI      Salem, Oregon

#### Inside Wireman Apprenticeship

### Summary of qualifications

1993

General Journeyman License

### Accreditations

Rockwell Automation System Integrator

Certified Drive Start-up Technician: Allen Bradley, ABB, Cutler Hammer

Advisory Board for Electronic Technology at Lane Community College





## **Tim Boyd**

### **System Integrator – The Automation Group**



#### **Key Skills**

- Experience in Water/Wastewater, Food and Beverage, Material Handling, and Instrumentation
- PLC Programming: Rockwell RSLogix 500, RSLogix 5000; Siemens Simatic Step 7; GE Proficy Machine Edition
- SCADA and HMI Development: Rockwell Factory Talk View; Wonderware
- Radio and Cellular Implementation: CalAmp Viper IP radios; Prosoft ICX35 cellular gateways
- Variable Frequency Drive Installation & Commissioning: Allen-Bradley Powerflex; ABB ACS550
- Instrumentation Calibration and Commissioning: Endress+Hauser, Hach, Siemens, Ashcroft, Rosemount
- Testing & Troubleshooting of Electrical and Automated Systems

#### **Professional Experience**

The Automation Group, Inc (TAG) **2012-present**

##### **Combined Water/Wastewater SCADA Design and Implementation, Lafayette, OR 2021**

- Developed comprehensive plan to upgrade 10 Water and Wastewater sites into new combined SCADA system.
- Electrical install supervision and programming of PLCs, HMI, and cellular gateway devices.
- Cellular M2M SCADA Implementation on Verizon Private Network.

##### **Kerr Concentrates Process Upgrades and Maintenance, Salem, OR 2016-present**

- Designed, managed, and programmed multiple process line improvement projects involving instrumentation and PLC modifications.
- Ongoing monthly instrumentation, PLC, and HMI programming support of fruit and vegetable concentrate processing lines.

##### **WTP System Upgrade, City of Toledo, OR 2016**

- Managed and implemented a PLC and HMI upgrade for the Water Treatment Plant.
- Programmed and migrated the plant from a SCADAPack system to a Control Logix platform while keeping the plant operational.

##### **WWTP and WTP Upgrades, City of Florence, OR 2012-2021**

- Replaced 42 existing Motorola Moscad-L Remote units w/ TAG RTU units which use a CalAmp Viper IP Radio network. Programmed and commissioned RTUs and modified SCADA computers at WWTP and WTP to reflect changes.
- Designed and programmed a new PLC-controlled system for an existing 4 pump booster station.
- Programmed and commissioned the PLC, HMI, and PanelView for a complete overhaul/reconstruction of an additional 4 pump booster station.
- Designed, programmed, and managed the installation of control systems for three new drinking water wells. Wells are monitored and controlled through radio telemetry linked to the WTP SCADA computer.

#### **Instrumentation Experience**

- Commissioning and Troubleshooting of instrumentation from multiple manufacturers.
- Specialize in Endress+Hauser level, pressure, and flow products.
  - Micropilot FMR20/FMR60
  - Waterpilot FMX21
  - Cerabar
  - Promag flow meters

#### **Electrical Certifications**

**General Supervising Electrician, 2011 - State of Oregon**

**General Journeyman Electrician, 2005 - State of Oregon**

## Richard D. Jobe



### Objectives:

Work in an environment where I am able to use all my technical and professional attributes to succeed as well as to help others and the company succeed.

### Skills and Qualifications:

#### Electronics

- Knowledgeable in electrical design
- Troubleshoot AC, DC circuitry
- Experience with measuring equipment
- Knowledgeable Microsoft Office: PowerPoint, Excel, Word
- Extensive operational skills with power tools and, hand tools
- Knowledgeable in automotive repair
- Able to read and understand blueprints and schematics
- Manufacturing and installation of HVAC systems
- Operated heavy equipment: Forklift, front end loader
- Studied computer repair: hardware and software

#### Operating Systems

- Installation and repair of Microsoft Operating Systems:
- Programmable Logic Control Systems
- Proficient in ControlLogix and RSLogix
- Knowledge of RMC100 Motion Controllers
- Knowledgeable of In-Sight Vision System programming Language
- Knowledgeable in G-code
- Computer Numerically Controlled operations
- CAD: Design PLC cabinet layouts
- Axis IP Cameras and Software
- Knowledge of MySQL and SQL DB
- Inductive Automation: Ignition Certified
- AllenBradly FactoryTalk View SE and ME
- GE Proficy SCADA Software

#### Leadership

- Department Supervisor
- Associate and customer Training
- Company Metrics
- Safety Programs and Training

#### General Knowledge

- Strong visual and verbal learning skills
- Great production operating and management skills

#### Education

Bachelor of Science Degree, Industrial Automation Engineering Technology  
ITT Technical Institute, Portland, OR -Graduated June 2007  
Cumulative G.P.A.: 3.43  
Alpha Beta Kappa

Associate of Applied Science Degree, Computer and Electronic Engineering Technology  
ITT Technical Institute, Portland, OR- Graduated September 2005  
Cumulative G.P.A.: 3.65

## Professional Experience

TAG – The Automation Group Inc  
Systems Integrator

April 2015 – Present

- PLC Design and Programming
- Instrumentation
  - Flow Meter
  - Level Sensors
  - Turbidity Meter
- SCADA / HMI / OIT Programming
- ACAD
- Troubleshooting

Hampton Affiliates – Tillamook Division – Tillamook, OR  
Process Control

November 2010 – April 2015

- Installation of automated lumber equipment
- PLC Controls
- Optimization
- Design and implement changes to system
- Design PLC and Drive cabinet layouts
- Design IP Camera Systems
- Network Layouts
- Onsite IT support

Sierra Pine Composite Solutions – Springfield, OR  
Process Control / Electrical Supervisor

September 2007 – November 2010

- Installation of automated equipment
- PLC Controls
- Optimization
- Design and implement changes to system
- Onsite IT Support

U.S. Natural Resources - Woodland, WA  
Field Engineer

June 2006 – August 2007

- Installation of automated lumber equipment
- PLC Controls
- Optimization
- Design and implement changes to system
- Design electrical and mechanical parts
- Optimization Tech support

Intel Corporation- Hillsboro, OR  
Manufacturing Technician

November 2005 -June 2006

- Manufacturing microprocessors/chipsets
- Operator of TEL Act8/12, Biorad laser measuring system, Optistation
- Owner of Area Bullpen Technical support
  
- Further Employment Upon Request

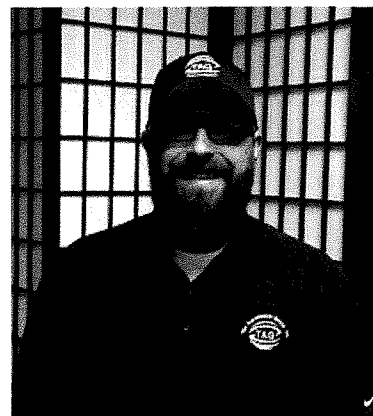
## Hobbies

Outdoors, Camping, Water sports, Motorcycles, Fishing

**References Available Upon Request**

## Dustin J. Perket

4296 SE Maya Ct  
Hillsboro, OR 97123  
331-431-7435, 503-488-9446  
dperket@tag-inc.us  
dperket@live.com



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**Controls Engineer with 10 years of experience working with electronics and automation. Proficient in all Rockwell programming platforms, system interfacing and radio communication. Knowledge of all types of motors and drive controllers. Project management in many large water/ wastewater SCADA systems, alarms systems, breweries and industrial installs.**

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### Work Experience

#### Systems Integrator

The Automation Group (TAG)

May 2015-Present

Eugene, OR

#### **Duties and Responsibilities**

- HMI/PLC design and programming
- Startup and commissioning
- Troubleshooting and service calls
- System engineering and design
- Project management

#### **Projects**

- Dundee Water System Improvements
  - Design, program, and commission new well control system
  - Setup new radio telemetry
  - Software; RSlogix5000, FactoryTalk ME, Freewave, Wonderware
- Lake Oswego WTP
  - Setup and calibration of all system instrumentation
  - Certified startups of ABB drive control systems
- Beaverton Pump Station
  - Setup the control scheme for pump control
  - Commissioning of the new system
- Banks Pump Station
  - Setup the control scheme for pump control
  - Commissioning of the new system
- NWNG Portland SCADA Upgrade
  - Installation of three new SCADA PCs with FactoryTalk SE, RSNetworkx, Historian, and Prosoft
  - HMI and PLC programming enhancements for the new control system
  - New installations of a “clean up skid” and level controller via Modbus communications
- Beverly Beach Water System
  - Emergency service call for a “corrupted” HMI program
  - Designed and programmed the entire HMI from scratch in one day
- Falcon Beach Water System
  - Install new SCADA PC with Wonderware and XLReporter



# Justin Heide

HMI Systems Integrator / Graphic Design



## Key Skills

Graphic Design, HMI/OIT Design and Implementation, Reporting, Alarming, IP Camera Systems.

**Computer Software:** FactoryTalk View Studio, RSView 32, WonderWare, RSLogix 500 and 5000 (Studio 5000), Sytech XLReporter, Microsoft Excel, Word, Corel Draw, Adobe Photoshop.

## Employment History

3/2011 to Present     **The Automation Group**  
HMI Systems Integrator

### Job Description:

- Develop SCADA and PanelView displays in FactoryTalk View SE and ME.
- Develop intelligent alarm strategies using FactoryTalk Alarm & Events.
- PLC Programming
- Develop reports for customers to supply to the State/Government using XLReporter.
- Implement alarm dial-out systems to alert customers of important events.
- Install VPN appliances to allow customers to remote view their SCADA systems.

9/1998 to 3/2011     **Instaprint/Shelton Turnbull**  
Graphic Designer  
Mail Processing/Digital Printing Manager

### Job Description:

- Developed digital printing solutions for use in variable print applications. Used V.I.P.P (Variable Intelligent Postscript Print) to create statement processing applications for Credit Unions.
- Developed mail-merge applications that used customer databases and processed them through mail software to apply discounted postage using barcodes.
- Created logos and brochures for customers.

## Education

2016     Rockwell Tech Ed – FactoryTalk SE, Studio 5000

1997     Lane Community College – Graphic Design

# Daren Dawson

## Electrical Design Engineer



### Experience

2013 - PRESENT The Automation Group, Inc.

Eugene, OR

#### Electrical Design Engineer

- Complete design build for UL508 control panels
- Manage/Design coordinating Drives and Starters for motor control
- Oversee Design and O & M/Submittal Department
- Produce complete drawings/details/specs/O&M's for review and construction

2005 - 2013

New Way Electric

Eugene, OR

#### Electrical Design Engineer/Project Manager

- Experienced in coordinating and managing electrical aspects of Commercial/Industrial projects from design concept to finished project
- Interface electrical design with Developers, Architects, Engineers, Contractors & Utilities
- Project cost estimates, scheduling, purchasing & coordinating with other trades
- Calculate project load summaries, fault currents & voltage drops
- Coordinate with utilities & inspectors regarding locations, installations & requirements
- Produce complete drawings/details/specs/O&M's for review & construction

2005

New Way Electric

Eugene, OR

#### Electrical Design Engineer/Project Intern

- Used AutoCAD to produce electrical blueprint designs
- Exposed to codes and industry regulations
- Worked with Electrical Designer's Software program
- Performed project cost estimating
- Submitted projects; interfaced with other experts on projects to gain professional development

### Education

2001-2005

Oregon State University

Corvallis, Oregon

#### B.S. in Electrical Engineering

- Emphasis on power systems, power electronics, electric machines, & fault studies
- Dynamic testing performance of synchronous, induction, DC, & switched reluctance motors using oscilloscopes, power analyzers, & function generators in OSU power lab
- Power electronics labs investigating components of variable frequency drives & induced variables when using VFD's to drive different motors

### Summary of qualifications

- Electrical Analysis, Load Calculations & Producing Plans (AutoCAD)
- Electrical Designer's Reference (Software)
- Fluke Power Analyzers, Electrical Testing Equipment
- National Electric Code (NEC)
- UL508

### The Automation Group (TAG) Key Personnel Availability

- Gary Jenks – 80% Available
- Tim Boyd – 80% Available
- Rick Jobe – 80% Available
- Dustin Perket – 80% Available
- Justin Heide – 80% Available
- Daren Dawson – 80% Available

The Automation Group (TAG) Accepts all the terms and conditions contained in the Request for Proposals

TAG is Licensed to do work in Oregon, CCB #172839

Gary Jenks (Owner) and Tim Spencer (Controller) are Authorized to represent and negotiate in signing any agreements that may result from this proposal



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
10/19/2021

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> KPD Insurance, Inc. PO Box 784 Springfield OR 97477	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): 541-741-0550      FAX (A/C, No): 541-741-1674 E-MAIL ADDRESS: wc-certs@kpdinsurance.com	
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
INSURER A : SAIF Corp		36196
INSURER B :		
INSURER C :		
INSURER D :		
INSURER E :		
INSURER F :		

**COVERAGES**      **CERTIFICATE NUMBER: 1142439253**      **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:						EACH OCCURRENCE	\$
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$
							MED EXP (Any one person)	\$
							PERSONAL & ADV INJURY	\$
							GENERAL AGGREGATE	\$
							PRODUCTS - COMP/OP AGG	\$
								\$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> NON-OWNED AUTOS ONLY <input type="checkbox"/> AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE  DED    RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
A	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y/N <input type="checkbox"/> N/A			747076	1/1/2021	1/1/2022	X PER STATUTE	OTH-ER
							E.L. EACH ACCIDENT	\$ 500,000
							E.L. DISEASE - EA EMPLOYEE	\$ 500,000
							E.L. DISEASE - POLICY LIMIT	\$ 500,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
 RE: All Operations  
 \* Required Employers' Liability limits are provided through the Excess/Umbrella Liability Policy (When increased EL Limits needed)

<b>CERTIFICATE HOLDER</b>  City of Carlton, OR 191 E Main Street Carlton OR 97111	<b>CANCELLATION</b>  SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE <i>Ricarda M. Burnett</i>
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Tim Spencer <tspencer@tag-inc.us>

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## Verification of insurance

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Evan Friese <evanf@kpdinsurance.com>

Tue, Oct 19, 2021 at 1:52 PM

To: Tim Spencer <accounting@tag-inc.us>

Cc: Whitney Sand <whitneys@kpdinsurance.com>, Amy Heckart <amyh@kpdinsurance.com>

This message was sent securely using Zix®

TAG Inc has the policies in place to meet the minimum requirements of \$1,000,000 professional liability, \$1,000,000 occurrence and \$2,000,000 aggregate general liability, and a \$1,000,000 automobile liability policy. TAG Inc. has a workers compensation policy with \$500k for employers liability and a \$5,000,000 umbrella policy that goes over it to more than satisfy the \$1,000,000 requirement.



EVAN FRIESE CIC, CPCU, CRIS NPN# 17061267

VICE PRESIDENT/RISK ADVISOR

10260 SW Greenburg Rd, Ste. 550. Portland, OR 97223

CELL | 503-277-3200

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## City of Carlton 2021 TAG Rates

• <u>Programming – HMI/OIT:</u>	<u>\$142.50</u>
• <u>Instrument Calibration:</u>	<u>\$142.50</u>
• <u>Engineering-Design:</u>	<u>\$150.00</u>
• <u>Panel Shop Labor:</u>	<u>\$ 71.50</u>
• <u>Electrical:</u>	<u>\$125.00</u>
• <u>Mechanical:</u>	<u>\$125.00</u>
• <u>Fab Shop Labor:</u>	<u>\$ 93.50</u>
• <u>Admin/Purchasing:</u>	<u>\$ 71.50</u>

- Straight Time: 8:00am to 4:30 pm, Monday thru Friday. Swing or Graveyard work can be prearranged at straight time rates if required for customer.
- Over Time: After 4:30pm (or after 8 hours) Weekdays and all day Saturdays & Sundays. (Time & ½ x straight time rates.)
- Double Time: Holidays (2 x straight time rate.)

### TAG Charges hourly service rate from Portal to Portal

Services are rendered in half-hour increments only with a 2 hour minimum billing charge, unless otherwise noted or arranged.

- Expenses: *Expenses of transportation (ie...airline tickets, rental cars, taxis) will be billed at cost plus 10% processing fees.*
- Standard Per Diem Rates: \$150/per night lodging and \$50/per day for meals.

### Standard Fuel/Mileage Rates:

- Round Trip from TAG office up to 50 Miles = \$30.00
- Round Trip from TAG office up to 100 miles = \$60.00
- Round Trip from Tag Office \*Over 100 miles at \$0.59 per Mile

Endress+Hauser Inc., 2350 Endress Place, Greenwood, IN 46143, USA

The Automation Group  
4678 Isabelle St.  
Eugene, OR 97402

**Contact**

Alan Vance  
Industry Manager - W/WW  
Phone 888-Endress  
Cell phone 813-404-0387  
alan.vance@us.endress.com

August 4, 2020

**Endress+Hauser Preferred Municipal System Integrator Program**

To whom it may concern:

The Automation Group (TAG) based in Eugene Oregon is a current member of our Endress+Hauser Preferred Municipal System Integrator Program. Endress+Hauser and our representative in Oregon Field Instruments and Controls work closely with TAG on instrumentation, services and solutions for municipal projects.

If you have any questions, please feel free to call me at 813-404-0387

Regards

Alan Vance

Process Training University –  
Preferred Municipal System Integrator Training

Participant Eric Wick

Training Provider Endress+Hauser, Inc. Greenwood, Indiana

Date of Training 11/8/2016 – 11/10/2016

Topics Start-up and Commissioning of the following:

- pH/ORP Measurement
- Dissolved Oxygen Measurement
- Conductivity Measurement
- Chlorine Measurement
- Turbidity Measurement
- Level Technology
- Ultrasonic and Radar
- Pressure Technology
- Hydrostatic for Level and Flow
- Flow Technology
- Magmeters and Ultrasonic Flow Meters

\*PDH Value 24

\*Statement to Professional Engineers: State boards of licensure have final authority with respect to approval of course PDH Values. It is the responsibility of the licensee to determine if the activity is pertinent to their Continuing Professional Competency needs. Decisions of individual state licensing boards take precedence over claims of course PDH units by Endress+Hauser, Inc.

  
Training Manager

