



TOWN *of*
WAKE FOREST

REQUEST FOR PROPOSALS
for the
Town of Wake Forest

RFP #2025-0121
Comprehensive Cost Recovery & Fee Study Analysis for
Quality of Life Services

DATE ISSUED

February 19, 2026

QUESTIONS AND CLARIFICATIONS DUE DATE

March 13, 2026 – 3PM

ADDENDUM POSTED

March 20, 2026 – 3PM

DUE DATE

March 27, 2026 – 3PM

E-Mail Address for Questions, Clarifications, and Submittal

Jack Cassidy, Grants Program Manager

jcassidy@wakeforestnc.gov

919-435-9551

Request for Proposals will be accepted until March, 27, 2026 at 3 p.m. Submittals must be made electronically via email to Jack Cassidy at jcassidy@wakeforestnc.gov.

Please contact Jack Cassidy via email or phone with any questions regarding this Request for Proposals.

****NOTE: ALL SUBMISSIONS RECEIVED AFTER THE STATED TIME WILL NOT BE ACCEPTED****

Overview and Purpose of Request:

With the continued growth of the Town, it has been determined that current user fees should be reviewed, researched and updated based on current industry standards. User fees within Parks, Recreation and Cultural Resources and the Wake Forest Renaissance Centre have historically been established based on periodic comparative research conducted by staff, with the most recent comprehensive fee study completed in 2018. Through this updated study, the Town intends to broaden the review to include the Wake Forest Center for Active Aging and Downtown Development to ensure a consistent, equitable, and data-driven approach to user fees across all Quality of Life departments.

Scope of Work:

The Town of Wake Forest is seeking qualified firms to conduct a Cost Recovery Analysis and Fee Study for the Parks, Recreation and Cultural Resources Department (PRCR), the Wake Forest Renaissance Centre, the Wake Forest Center for Active Aging, and Downtown Development. This study should be prepared in time for recommendations to be enacted in Fiscal Year 2027-28.

The scope of work shall consist of the following:

Cost Recovery Analysis and Fee Study

- Conduct a comprehensive review of the Departments' current fees and rate structures including, but not limited to, facility reservations, rental fees, recreational programs/classes, athletic leagues/clinics, aquatics fees and miscellaneous fees.
- Meet with staff to conduct interviews to understand the Town's policies, processes and operation, and current practices for establishing fees.
- Identify the total cost (including all departmental revenues and expenses, internal service fees and the relevant portion of facility cost allocation) for each program and service.
- Ensure that the process identifies the total cost by a set of clear cost of accounting definitions (e.g., direct, indirect, overhead, and cost allocation plan).
- Evaluate cost recovery levels and best practices for establishing fees.
- Evaluate and recommend best practices for vendor fees and food truck fees across a wide variety of public events, including festivals, athletic events, public gatherings and more.
- Evaluate fee assistance/scholarship program.
- Evaluate resident and non-resident fees and registration waiting periods.
- Recommend best practices for compensation to instructors, experts, performers, etc.
- Compare fees across similar municipalities.
- Compare existing fee practices across departments within the Town of Wake Forest.
- Compare service/program cost with existing cost recovery practices.
- Recommend appropriate fees to be charged based on analysis and taking into consideration appropriate subsidy percentage for those service/program areas where full cost recovery may not be feasible.
- Identify fees that are not currently charged but under the laws, statutes, rules and regulations governing the collection of fees for public entities, could be charged to improve cost recovery levels.
- Review budget and operational expenses and make recommendations to maximize efficiency and cost savings.
- Review current revenue generation and recommend changes based on cost recovery and fee study.

- Prepare report and present findings to the Town of Wake Forest Board of Commissioners.

The Town of Wake Forest will require the following:

- The Town will require the selected firm to meet with a core group of Town Staff as needed to ensure the project will serve the needs of the Town of Wake Forest prior to the beginning of the process.
- When submitting proposals to the Town of Wake Forest, the selected firm will include all other firms or individuals they will be working with as part of their team and will provide references of projects, including contact information for the customer project administrator, similar to scope and size they have completed.
- The Town will require the selected firm to provide an overall review of methodology to prior to presentation to the Board of Commissioners. The firm will prepare a comprehensive report and present findings and recommendations to the PRCR Advisory Board, Public Arts Commission, town staff and Board of Commissioners.
- The firm will create and review fee schedule implementation and recommend schedule for creating/updating fees.
- The firm will complete their study and provide their presentation to the Board of Commissioners within 9-12 months of the project beginning on July 1, 2026.
- A contract similar in form, content, and substance to the Sample Contract attached hereto as Appendix A.

Qualifications:

Submissions shall include information that demonstrates clear, concise information that relates directly to this project. The firm must demonstrate the ability to meet the Town of Wake Forest's needs and do such within a reasonable timeline. The study must be completed within 9 to 12 months.

Submissions will be scored according to the below rubric. Scoring weights have been included. Submissions shall be organized in the following order.

Expertise (40%)

- Demonstrate a strong background in preparing cost recovery and fee study analyses, including projects that were completed within budget, the ability to foresee and address potential issues and concerns, and the ability to work effectively with town staff.

Project Vision (20%)

- Provide a statement of proposed project approach.
- Recommend additions or revisions to the scope of work.
- Estimate a timeline for completion.

Project Cost (15%)

- Provide a cost estimate for the scope of work.

Team Organization (15%)

- Identify the project lead staff person and that person's qualifications.

- Provide brief qualifications and organization of other key team members involved with this project.
- Identify location of all members working on this project including current contact information for each member.

Legal History (10%)

- Include a history of litigation and disputes including any pending litigation, arbitration, and disputes. Include results of past litigation, disputes, and arbitration.

Anticipated Schedule

- February 19, 2026: RFP release
- March 13, 2026: Questions and clarifications deadline
- March 20, 2026: Questions and clarifications response
- March 27, 2026: Submission deadline
- April 2026: Selection committee convenes to review and score submissions
- May 2026: Highest ranked firm notified
- May 2026: Contract approved
- July 1, 2026: Project commences
- April-June, 2027: Selected firm provides final report and presents to the Town of Wake Forest Board of Commissioners

Award and Contract

Proposals may be opened by The Town of Wake Forest at any time after the submission deadline. All proposals satisfying the requirements of this RFP will be evaluated to establish which best fulfills the needs of The Town of Wake Forest. The Town of Wake Forest anticipates entering into a contract with one of the firms submitting an RFP to execute the proposed work. This RFP, however, does not commit the Town of Wake Forest to award a contract, or pay any cost incurred in the preparation of the proposals. The Town of Wake Forest reserves the right - in the Town's discretion and pursuant to applicable law and policy - to accept or reject any and all proposals received as a result of this request, to negotiate with qualified firms or to cancel this RFP, if it is in the best interest of The Town of Wake Forest to do so.

Appendix A – Sample Contract

The below represents the insurance requirements and other contractual terms and conditions that will apply to the Cost Recovery and Fee Analysis Consulting Services to be performed pursuant to this Request for Proposals

TOWN OF WAKE FOREST

PROFESSIONAL SERVICES CONTRACT, TERMS & CONDITIONS

CONTRACTOR: _____

SUBJECT OF CONTRACT: _____

DATES/TERM OF CONTRACT: _____

COMPENSATION: _____

DEPARTMENT: _____

THIS AGREEMENT (“Contract” or “Agreement” is made and entered into as of the _____ day of _____, 20____, by the Town of Wake Forest (“Town”) and the contractor named above (“Consultant” or “Contractor”), organized and existing under the laws of the State of North Carolina.

Services to be performed: Services shall be performed according to the Terms and Conditions contained herein and as described by Attachment 1 and any other attachment, said attachment(s) being attached hereto and fully incorporated herein.

Payment: the Town shall pay \$_____ total for services rendered.

INSURANCE

Contractor shall maintain, at its sole expense throughout this Contract, the insurance coverages and limits described herein on a primary and non-contributory basis. These insurance requirements and any Town review or acceptance of Contractor's insurance do not limit or qualify Contractor's liabilities or obligations under this Contract. The insurance requirements mandated herein are minimum requirements for Contractor and in no way limit the indemnity covenants contained in the contract. The Town in no way warrants that the minimum limits contained herein are sufficient to protect the Contractor from liabilities that might arise out of the performance of their work; Contractor is free to purchase additional insurance as necessary.

Workers' Compensation Insurance - Contractor agrees to maintain Worker's Compensation Insurance in accordance with North Carolina General Statute Chapter 97.

Employer's Liability Insurance. Contractor agrees to maintain the minimum recommended limit is \$1,000,000 per each accident /\$1,000,000 per each occupational disease and \$1,000,000 policy limit.

Commercial General Liability - Contractor agrees to maintain commercial general liability insurance with limits of no less than \$2,000,000 each occurrence and \$4,000,000 aggregate. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability, Cross Liability, or Personal and Advertising Injury Liability. Town shall be named as additional insured as described below.

Professional Liability - Contractor agrees to maintain professional liability insurance with limits of no less than \$1,000,000 each occurrence and \$2,000,000 aggregate. Coverage shall not contain any endorsement(s) excluding nor limiting Product/Completed Operations, Contractual Liability, Cross Liability, or Personal and Advertising Injury Liability. Town shall be named as additional insured as described below.

Commercial Automobile Liability – If performance under this contract requires the use of vehicles, Contractor agrees to maintain commercial automobile liability insurance with limits of no less than \$1,000,000 combined single limit – any auto. Coverage shall include liability for Owned, Non-Owned and Hired automobiles. In the event Contractor does not own automobiles but performance under this contract requires the use of vehicles, Contractor agrees to maintain coverage for Hired and Non-Owned Auto Liability, which may be satisfied by way of endorsement to the Commercial General Liability policy or separate Auto Liability policy.

If – in the performance of this contract - a vehicle that can carry more than 12 persons (including driver) is being used by Contractor, the limits shall be increased to \$2,000,000. This \$2,000,000 limit may be achieved by utilizing an Umbrella or Excess policy with a per occurrence limit of \$1,000,000.

Umbrella or Excess Liability - Contractor may satisfy the minimum liability limits required above under an Umbrella or Excess Liability policy. There is no minimum Per Occurrence limit of liability under the Umbrella or Excess Liability, however, the Annual Aggregate limits shall not be less than the highest 'Each Occurrence' limit for required policies. Contractor *agrees to endorse the Town as an 'Additional Insured' on the Umbrella or Excess Liability unless the Certificate of Insurance states the Umbrella or Excess Liability provides coverage on a 'Follow-Form' basis.*

Additional Insured. The Contractor's General Liability policy shall be endorsed, specifically or generally, to include the Town of Wake Forest as Additional Insured.

The Contractor shall disclose any self-insured retention and this is only allowed in lieu of coverage if pre- approved by Wake Forest's Safety and Risk Manager.

Primary and Non-Contributory Coverage. Insurance required to be maintained by the Contractor under this Agreement shall apply on a primary and non-contributory basis with respect to the Town, its

officers, officials, employees, agents, and volunteers. Any insurance or self-insurance maintained by the Town shall be excess of and shall not contribute with Contractor's insurance.

Waiver of Subrogation Rights. Contractor and its insurers waive all rights of subrogation against the Town, its officers, officials, employees, agents, and volunteers for any claims arising out of Contractor's work under this Agreement. Contractor shall cause its insurers to endorse such waiver on all applicable policies required under this Agreement. This waiver shall apply regardless of whether the Town has received a specific waiver endorsement from Contractor's insurer.

Certificate of Insurance. Contractor shall provide proof of the required insurance coverage(s) in the form of an original current certificate of insurance **presented by the Insured's agency** before the Contractor is allowed to perform any work for the Town. The Certificate Holder is the Town of Wake Forest, Attn.: Safety and Risk Manager, 301 S. Brooks Street, Wake Forest, North Carolina, 27587.

Failure to Procure Coverage. In the event that any policy of insurance required under this Agreement does not comply with the requirements, is not procured, or is canceled and not replaced, the Town has the right but not the obligation or duty to terminate the Agreement. Maintenance of required insurance coverage is a material element of the Agreement and failure to maintain or renew such coverage or to provide evidence of renewal may be treated by Town as a material breach of contract.

Claims Made Policies. If any of the required policies provide coverage on a claims made basis, the policy must have an extended reporting period/tail of at least two (2) years following the termination of the Contract. The Retroactive Date must be shown and must be before the date of the contract or the beginning of contract work.

Notice of Cancellation/Changes. Either the Contractor or its insurance agency shall provide thirty (30) days prior written notice to the Town in the event of cancellation or material changes, except when cancellation is for non- payment of premium, then ten (10) days prior notice may be given. Notice shall be sent directly to:

**Attn: Safety and Risk Manager
Town of Wake Forest
301 S. Brooks Street Wake Forest, NC 27587**

Carrier Authorization. All insurance companies must be authorized to do business in North Carolina and be acceptable to the Town of Wake Forest's Risk Manager. The Town may increase, decrease or waive insurance limits at its sole discretion.

Subcontractors. Contractor shall require and verify that all subcontractors maintain insurance meeting all the requirements stated herein, and Contractor shall ensure that Town is an additional insured on insurance required from subcontractors.

Special Risks or Circumstances. Town reserves the right to modify these requirements, including limits, based on the nature of the risk, prior experience, insurer, coverage, or other special circumstances. TOWN shall give notice to Contractor of any such requirements prior to the execution of

this contract, or within such reasonable time as TOWN becomes aware of the need for such additional or increased coverages.

Miscellaneous. The failure of the Town at any time to enforce the insurance provisions, to demand such certificates of insurance, or to identify a deficiency shall not constitute a waiver of those provisions, nor reduce obligations of the Contractor to maintain such insurance or to meet its obligations under the indemnification provisions. Notwithstanding the foregoing, nothing contained herein shall be deemed to constitute a waiver of the governmental immunity of the Town, which immunity is hereby reserved to the Town.

Other Terms and Conditions

1. **Applicability.** These Consolidated Terms and Conditions govern purchases and contracts with the Town of Wake Forest. Any attached Contractor/Vendor quotes or proposals are incorporated as a binding description of goods and services to be provided, but are otherwise for scope only if they contradict these Terms and Conditions. These Terms and Conditions govern agreements for performance, goods, services, participation in Town events (performers, food trucks, other vendors), or any combination thereof as may be required in the Contract.
2. **Definitions:** In this document, unless the context requires otherwise:
 - a. "Town" means the Town of Wake Forest.
 - b. "Contractor" or "Vendor" means the Contractor and any authorized Agent, Officer, Employee, or Sub-Contractor.
 - c. "Contract" or "Agreement" means these terms and conditions and all attached documentation, all of which make up the binding agreement between the Town and Contractor.
3. **Shipping and Delivery:** All packages must bear the correct Purchase Order number on the outside of each package or shipping container. The Town of Wake Forest will not be responsible for any goods delivered without a Purchase Order, if applicable, having been issued. All prices must be F.O.B. Destination and delivered to the destination indicated on the Purchase Order. Where specific purchase is quoted or negotiated F.O.B. Shipping Point, the Contractor is to prepay the shipping charges and add them to the invoice. The risk of loss and damage to the goods which are the subject of this order shall be the Contractor's until the goods are delivered to the destination set out in the order and accepted by the purchaser or its representative. Any rejected materials will be returned to the Vendor at the Vendor's risk and expense. In the event of a vendor's failure to deliver or perform as specified, the Town reserves the right to cancel the order or any part thereof, without prejudice to its other rights. The Vendor agrees that the Town may return part or all of any shipment and may charge the vendor with all reasonable losses or expenses sustained as a result of such failure to deliver or perform. In case of default of the contractor, the Town may procure the articles or services from other sources and charge the Vendor damages for any excess costs or other damages caused by the default.
4. **Health and Safety.** Contractor shall be responsible for initiating, maintaining and supervising all safety precautions and programs required by the Occupational Safety and Health Administration (OSHA) and all other regulatory agencies while providing Services under this Contract. Contractor

shall provide proof that a **Drug-Free Workplace Program** is in place and that drivers meet **DOT/CDL licensing** requirements, if requested.

5. **Delay of Performance.** Performance of services will start at the time stated in Attachment 1 unless otherwise agreed to in writing by the Parties. Time is of the essence with respect to all provisions of this contract that specify a time for performance.
6. **Invoicing and Payment.** All invoices must be sent by email to: accounts.payable@wakeforestnc.gov or mailed to the Town of Wake Forest, Accounts Payable, 301 S. Brooks Street, Wake Forest, NC 27587. All invoices must include a unique invoice number and the applicable Purchase Order number. Invoices for partial deliveries must be indicated as such. The Contractor must provide separate invoices for each Purchase Order number. The Town of Wake Forest is not exempt from State or County Sales Tax. Sales Tax will be paid from the Contractor's invoice when submitted. The Town of Wake Forest is exempt from Federal Excise Tax. If any form of such tax is billed on the invoice, it must be shown as a separate item. Tax Exemption Certificates will be furnished upon request. Payment term discounts will be deducted as provided for on the Purchase Order or in accordance with the terms of the official quotation or bid. Net purchases will be paid 30 days from the date of the invoice, or upon acceptance of goods or services.
7. **Licensing and Certification.** Contractor must possess and maintain proof of current and valid professional certifications, licenses, or other credentials necessary to perform the services mandated by the Contract. Said certification, licenses, or credentials shall be provided to the Town within five (5) days of written request by the Town. The Town reserves the right to verify all certifications or licenses and to deny or terminate this agreement if such credentials are found to be invalid or expired.
8. **Deadline.** All documents required to be submitted to the Town of Wake Forest under this contract, including any insurance policies, must be received by the Town prior to performance.
9. **Contract Modification.** The conditions of this Contract cannot be modified except by written amendment signed by both Parties and otherwise in accordance with requirements of law. Further, a modification is not enforceable against the Town unless the Town Manager or other duly authorized official signs it for the Town. This contract contains the entire agreement between the parties pertaining to the subject matter of this contract. With respect to that subject matter, there are no promises, agreements, conditions, inducements, warranties, or understandings, written or oral, expressed or implied, between the parties, other than as set forth or referenced in this contract.
10. **Default and Remedies.** Any rejected materials will be returned to the Contractor at the Contractor's risk and expense. In the event of a Contractor's failure to deliver or perform as specified, the Town reserves the right to cancel the order or any part thereof, without prejudice to its other rights. The Contractor agrees that the Town may return part or all of any shipment and may charge the Contractor with all reasonable losses or expenses sustained as a result of such failure to deliver or perform. In

case of default of the contractor, the Town may procure the articles or services from other sources and charge the Contractor damages for any excess costs or other damages caused by the default.

11. **Indemnity.** To the fullest extent permitted by North Carolina law and within the limitations described in N.C.G.S. §22B-1, the Contractor shall indemnify and hold harmless the Town, its officers, agents, and employees, from and against any and all claims, damages, losses, and expenses, including reasonable attorney's fees and costs, but only to the extent caused by the negligent acts, errors, or omissions of the Contractor, its employees, agents, or subcontractors in the performance of professional services under this Agreement. This indemnification obligation shall not apply to any claims, damages, losses, or expenses that are caused by the negligence or willful misconduct of the Town, its officers, agents, or employees. Nothing in this clause shall require the Contractor to defend the Town or pay for defense costs in advance of a final determination of the Contractor's liability.
12. **Compliance with Laws, Hold Harmless.** It is agreed that the goods, materials, equipment, or services provided shall comply with all Federal, State or local laws, and that the Contractor shall defend actions or claims brought, and save harmless the Town, and/or its officials or employees, from loss, cost or damage by reason of actual or alleged failure to comply with such laws. In performing all of the Work, the Contractor shall comply with all applicable law.
13. **Acceptance of Terms.** The Town may, at any time, insist upon strict compliance with these terms and conditions, notwithstanding any previous custom, practice, or course of dealing to the contrary. Acceptance of the order includes acceptance of all terms, conditions, prices, delivery instructions and specifications as shown on this document or attached to and made a part of this order.
14. **Choice of Law and Forum.** This contract shall be deemed made in Wake County, North Carolina. This contract shall be governed by and construed in accordance with the law of North Carolina. The exclusive forum and venue for all actions arising out of this contract shall be the appropriate division of the North Carolina General Court of Justice, in Wake County. Such actions shall neither be commenced in nor removed to federal court. This section shall not apply to subsequent actions to enforce a judgment entered in actions heard pursuant to this section.
15. **Acceptance of Terms, Waiver, Severability.** The Town may, at any time, insist upon strict compliance with these terms and conditions, notwithstanding any previous custom, practice, or course of dealing to the contrary. Acceptance of the order includes acceptance of all terms, conditions, prices, delivery instructions and specifications as shown on this document or attached to and made a part of this order. No action or failure to act by the Town shall constitute a waiver of any of its rights or remedies that arise out this contract, nor shall such action or failure to act constitute approval of or acquiescence in a breach thereunder, except as may be specifically agreed in writing. If any provision of this contract shall be unenforceable, the remainder of this contract shall be enforceable to the extent permitted by law.

16. **Performance of Government Functions.** Nothing contained in this contract shall be deemed or construed in any way to stop, limit, or impair the Town from exercising or performing any regulatory, policing, legislative, governmental, or other powers or functions.
17. **Assignment, Successors and Assigns:** Without the Town's written consent, the Contractor shall not assign (which includes to delegate) any of its rights (including the right to payment) or duties that arise out of this contract. Unless the Town otherwise agrees in writing, the Contractor and all assigns shall be subject to all of the Town's defenses and shall be liable for all of the Contractor's duties that arise out of this contract and all of the Town's claims that arise out of this contract. Without granting the Contractor the right to assign, it is agreed that the duties of the Contractor that arise out of this contract shall be binding upon it and its heirs, personal representatives, successors, and assigns.
18. **No Third Party Right Created.** This contract is intended for the benefit of the Town and the Contractor and not any other person.
19. **Principles of Interpretation.** In this contract, unless the context requires otherwise, the singular includes the plural and the plural the singular. The pronouns "it" and "its" include the masculine and feminine. Reference to statutes or regulations include all statutory or regulatory provisions consolidating, amending, or replacing the statute or regulation. References to contracts and agreements shall be deemed to include all amendments to them. The word "person" includes natural persons, firms, companies, associations, partnerships, trusts, corporations, governmental agencies and units, and any other legal entities.
20. **Public Record.** Notwithstanding any other provisions of this Contract, this Contract and all materials submitted to the Town by the Contractor are subject to the public records laws of the State of North Carolina. It is the responsibility of the Contractor to properly designate materials that may be protected from disclosure as trade secrets under North Carolina law as such and in the form required by law prior to the submission of such materials to the Town. Contractor understands and agrees that the Town may take any and all actions necessary to comply with federal, state, and local laws and/or judicial orders and such actions will not constitute a breach of the terms of this Contract. To the extent that any other provisions of this Contract conflict with this paragraph, the provisions of this section shall control.
21. **No pledge of taxing authority.** The taxing power of the Town of Wake Forest is not pledged directly or indirectly to secure any monies due under this contract.
22. **No waiver of governmental immunity; Violation of law.** Except for waiver of governmental immunity resulting from the execution of a valid contract, the Town of Wake Forest makes no other waiver of governmental immunity or any other defense or remedy available in law or equity. If any provision of the Contract or Agreement is in violation of any legal, statutory, or state constitutional prohibition, then such provision(s) shall be unenforceable against the Town of Wake Forest.

23. **Conflict of Interest.** If this is a contract for design, engineering, contract administration or similar services, the Contractor will not enter into contracts or agreements with third parties that may present a potential for conflict of interest between the Town of Wake Forest and the third parties regarding the subject matter of this Contract or Agreement.
24. **Audit Rights.** For all Services being provided hereunder, the Town shall have the right to inspect, examine, and make copies of any and all books, accounts, invoices, records and other writings relating to the performance of the Services. Audits shall take place at times and locations mutually agreed upon by both parties. Notwithstanding the foregoing, Contractor must make the materials to be audited available within one (1) week of the request for them.
25. **Pre-Audit.** This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.
26. **Non-appropriation clause.** Contractor acknowledges that the Town of Wake Forest is a governmental entity, and the contract validity is based upon the availability of public funding under the authority of its statutory mandate. In the event that public funds are unavailable and not appropriated for the performance of the Town of Wake Forest's obligations under this contract, then this contract shall automatically expire without penalty to the Town of Wake Forest thirty (30) days after written notice to Contractor of the unavailability and non-appropriation of public funds. It is expressly agreed that the Town of Wake Forest shall not activate this non-appropriation provision for its convenience or to circumvent the requirements of this contract, but only as an emergency fiscal measure during a substantial fiscal crisis, which affects generally its governmental operations. In the event of a change in the Town of Wake Forest's statutory authority, mandate and mandated functions, by state and federal legislative or regulatory action, which adversely affects the Town of Wake Forest's authority to continue its obligations under this contract, then this contract shall automatically terminate without penalty to the Town of Wake Forest upon written notice to Contractor of such limitation or change in the Town of Wake Forest's legal authority.

NON-DISCRIMINATION AND EQUAL OPPORTUNITY (Sections 27-30)

27. **Town Policy.** THE TOWN OPPOSES DISCRIMINATION ON THE BASIS OF RACE AND SEX AND URGES ALL OF ITS CONTRACTORS TO PROVIDE A FAIR OPPORTUNITY FOR MINORITIES AND WOMEN TO PARTICIPATE IN THEIR WORK FORCE AND AS SUBCONTRACTORS AND CONTRACTORS UNDER TOWN CONTRACTS.
28. **Non-discrimination.** The Town and Contractor, for themselves, their agents, officials, employees, and servants agree not to discriminate in any manner on the basis of race, color, creed, national origin, sex, age, handicap, or sexual orientation with reference to the subject matter of this Contract, no matter how remote.

29. **EEO Provisions.** During the performance of this Contract the Contractor agrees as follows:

- A. The Contractor shall not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, political affiliation or belief, age, or handicap. The Contractor shall take affirmative action to ensure that applicants are employed and that employees are treated equally during employment, without regard to race, color, religion, sex, national origin, political affiliation or belief, age, or handicap. The Contractor shall post in conspicuous places available to employees and applicants for employment, notices setting forth these EEO provisions.
- B. The Contractor in all solicitations or advertisements for employees placed by or on behalf of the Contractor, shall state all qualified applicants will receive consideration for employment without regard to race, color, religion, sex, national origin, political affiliation or belief, age, or handicap.

30. **Title VI:** During the performance of this contract, the Contractor, for itself, its assignees, and successors in interest (hereinafter referred to as the "contractor") agrees as follows:

- A. **Compliance with Regulations:** The contractor shall comply with the Regulation relative to nondiscrimination in Federally-assisted programs of the Town of Wake Forest Title 49, Code of Federal Regulations, Part 21, as they may be amended from time to time, (hereinafter referred to as the Regulations), which are herein incorporated by reference and made a part of this contract.
- B. **Nondiscrimination:** The contractor, with regard to the work performed by it during the contract, shall not discriminate on the grounds of race, color, national origin, sex, religion, age, or disability in the selection and retention of subcontractors, including procurements of materials and leases of equipment. The contractor shall not participate either directly or indirectly in the discrimination prohibited by section 21.5 of the Regulations, including employment practices when the contract covers a program set forth in Appendix B of the Regulations.
- C. **Solicitations for Subcontractors, Including Procurements of Materials and Equipment:** In all solicitations either by competitive bidding or negotiation made by the contractor for work to be performed under a subcontract, including procurements of materials or leases of equipment, each potential subcontractor or supplier shall be notified by the contractor of the contractor's obligations under this contract and the Regulations relative to nondiscrimination on the grounds of race, color, or national origin.
- D. **Information and Reports:** The contractor shall provide all information and reports required by the Regulations or directives issued pursuant thereto, and shall permit access to its books, records, accounts, other sources of information, and its facilities as may be determined by the Town to be pertinent to ascertain compliance with such Regulations, orders, and instructions. Where any information required of a contractor is in the exclusive possession of another who

fails or refuses to furnish this information the contractor shall so certify to the Town as appropriate and shall set forth what efforts it has made to obtain the information.

- E. **Sanctions for Noncompliance:** In the event of the contractor's noncompliance with the nondiscrimination provisions of this contract, the Town shall impose such contract sanctions as it or the Town may determine to be appropriate, including, but not limited to: 1) withholding of payments to the contractor under the contract until the contractor complies, and/or 2) cancellation, termination, or suspension of the contract, in whole or in part.
- F. **Incorporation of Provisions:** The contractor shall include the provisions of paragraphs (a) through (f) of this Section 25 in every subcontract, including procurements of materials and leases of equipment, unless exempt by the Regulations, or directives issued pursuant thereto. The contractor shall take such action with respect to any subcontract or procurement as the Town may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, however, that, in the event a contractor becomes involved in, or is threatened with, litigation with a subcontractor or supplier as a result of such direction, the contractor may request the Town to enter into such litigation to protect the interests of the Town, and, in addition, the contractor may request the United States to enter into such litigation to protect the interests of the United States.

31. **E-Verify.** Contractor understands that E-Verify is the federal E-Verify program operated by the United States Department of Homeland Security and other federal agencies, or any successor or equivalent program used to verify the work authorization of newly hired employees pursuant to federal law in accordance with NCGS §64-25 et seq. Contractor is aware of and in compliance with the requirements of E-Verify and Article 2 of Chapter 64 of the North Carolina General Statutes. To the best of the Contractor's knowledge, any subcontractors employed by them as a part of this contract are in compliance with the requirements of E-Verify and Article 2 of Chapter 64 of the North Carolina General Statutes.
32. **Iran Divestment Act Certification.** Contractor certifies that: a) It is not identified on the Final Divestment List or any other list of prohibited investments created by the NC State Treasurer pursuant to N.C.G.S. 147-86.58; b) It will not take any action causing it to appear on any such list during the term of this Contract; and c) It will not utilize any subcontractor to provide goods or services hereunder that is identified on any list.
33. **Divestment from Companies that Boycott Israel.** Contractor represents, covenants, and certifies that it is not listed on the list of restricted companies developed and published by the North Carolina State Treasurer as required by N.C.G.S. 147-86.81.
34. **Quality and Workmanship.** All work performed and/or services rendered shall be performed to the satisfaction of the Town of Wake Forest. The work performed and/or services rendered shall not be

considered complete, nor applicable payments rendered, until the Town is satisfied with the work performed and/or services rendered.

35. **Conflict in Terms or Other Documents.** In the event of any inconsistency, conflict, or ambiguity between these terms and conditions and any other associated contract documents, the parties agree that the terms and conditions of this document shall prevail unless otherwise agreed to in writing by the Parties.
36. **Force Majeure:**
- A. Except as otherwise provided in any environmental laws, rules, regulations or ordinances applicable to the parties and the services performed under this Contract, neither party shall be deemed to be in default of its obligations hereunder if and so long as it is prevented from performing such obligations by an act of war, hostile foreign actions, nuclear explosion, earthquake, hurricane, tornado, or other catastrophic natural event or act of God.
 - B. Either party to the Contract must take reasonable measures and implement reasonable protections when a weather event otherwise defined as a force majeure event is forecast to be eligible to be excused from the performance otherwise required under this Contract by this provision.
37. **Intellectual Property.** All intellectual property, including, but not limited to, patentable inventions, patentable plans, copyrightable works, mask works, trademarks, service marks and trade secrets invented, developed, created or discovered in performance of services under this Contract shall be the property of the Town. Copyright in and to any copyrightable work, including, but not limited to, copy, art, negatives, photographs, designs, text, software, or documentation created as part of the Contractor's performance of services under this Contract shall vest in the Town. Works of authorship and contributions to works of authorship created by the Contractor's performance of services under this Contract are hereby agreed to be 'works made for hire' within the meaning of 17 U.S.C. 201.
38. **Cancellation.** The Town may terminate this Contract at any time by providing written notice to the Contractor. Contractor shall cease performance immediately upon receipt of such notice. In the event of early termination, Contractor shall be entitled to receive just and equitable compensation for costs incurred prior to receipt of notice of termination and for the satisfactory work completed as of the date of termination and delivered to the Town. Notwithstanding the foregoing, in no event will the total amount due to Contractor under this section exceed the total amount due Contractor under this Contract.
39. **Public Communication. Advertising.** Except as permitted or required by this Agreement, and except as required by the North Carolina Public Records Act or any other applicable law or policy, both Parties agree that any public statements, social media posts, or other public communications regarding this contract or its cancellation shall not be made. To the extent any such public communications or posts are necessary, said public communications or posts shall be made in a

professional and diplomatic manner. The Town values open communication, professionalism, and mutual respect in its relationships with its service-providers. Organizations contracting or otherwise associating with Town operations are encouraged to address concerns or feedback about Town operations through appropriate channels, including direct communication with the relevant Town department or representative. While the Town respects the constitutional rights of individuals and organizations to publicly express their views regarding matters of public concern, including through social media, service-providers are expected to conduct themselves in a manner that supports a productive and respectful working relationship. Public statements that are not of public concern, or are knowingly false or defamatory, or that disclose confidential or proprietary information may be considered a breach of contract and subject to appropriate remedies as outlined in the agreement and in accordance with applicable law. This Section shall not be interpreted in a manner that unlawfully prohibits permissible speech. The Agreement and/or relationship among the parties shall not be used for any advertising purposes, including referrals or testimonials, by either party without the express written consent of the other party.

40. **Notices.** All notices and other communications required or permitted by the Agreement shall be in writing and shall be given either by personal delivery, fax or certified United States mail, return receipt requested, addressed as follows:

To the Town:

Attn: Town Manager
301 S. Brooks St.
Wake Forest, NC 28715

To Contracting Party(ies):

Attn: _ (full name)
(address_1_and_2)
(city), (state) (zip)

41. **Existence and Signature Warranties.** Any party executing the Agreement as a corporate or other legal entity represents to the other parties hereto that such entity is duly organized, validly existing and in good standing under the laws of the State of North Carolina or otherwise under the laws of the state of its formation, and is qualified to transact the business contemplated herein within the State of North Carolina, and further that any such party executing the Agreement on behalf thereof, has the full power and authority to do so without any further authorization being required from any party, and thereby legally binds said entity to the terms and conditions of this Agreement.

42. **Miscellaneous.**

- A. The Contractor shall be responsible for the proper custody and care of any property furnished or purchased by the Town for use in connection with the performance of this Contract, and will reimburse the Town for the replacement value of its loss or damage.
- B. The Contractor shall be considered an Independent Contractor and as such shall be wholly responsible for the work to be performed and for the supervision of its employees. Nothing herein is intended or will be construed to establish any agency, partnership, or joint venture.

C. Contractor represents that it has, or will secure at its own expense, all personnel required in performing the services under this Contract. Such employees shall not be employees of or have any individual contractual relationship with the Town.

D. No oral statement made by the Parties shall apply hereto unless agreed upon in writing.

E. Any other applicable documentation (such as a Request for Production) is fully incorporated into this Agreement and shall apply as written unless otherwise addressed herein.

Questions or Clarifications. Any questions regarding these Terms and Conditions should be directed to the Town's Purchasing Manager at (919) 435-9474 or rdriver@wakeforestnc.gov.

[signatures are on the following page]

AUTHORIZED SIGNATURES and PRE-AUDIT CERTIFICATE

For the Contractor (Contractor): _____

Name and Title: _____

Date: _____

For the Town of Wake Forest:

Name and Title: Kip Padgett, Wake Forest Town Manager

Date:

This instrument has been pre-audited in the manner required by the Local Government Budget and Fiscal Control Act.

Town of Wake Forest Chief Financial Officer or Designee Date

Attachment 1 (Enter Details and Scope of Work)