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**REQUEST FOR PROPOSAL  
DESIGN AND IMPLEMENTATION OF  
WAYFINDING SIGNAGE SYSTEM  
2016-03**

**Proposals are due July 29, 2016 at 5:00 p.m.**

**June 29, 2016**

**REQUEST FOR PROPOSAL**  
**DESIGN AND IMPLEMENTATION OF WAYFINDING SIGNAGE SYSTEM**  
**2016-03**

The City of Perry seeks to develop a comprehensive informational and wayfinding signage system that facilitates wayfinding leading into, and throughout, the City. This wayfinding signage system should address the needs of the City, Perry residents, Perry commercial interests, and visitors using all modes of transportation. Street level vitality, legibility, safety, maintenance and replacement costs are all major concerns in creating a wayfinding system that is accurate, concise, and welcoming. The system should be planned and developed in a way that is easily expanded upon as Perry continues to grow and the community changes. The program should consider a variety of sign types including, but not limited to:

- General wayfinding signage e.g. directional signage, informational signage, gateway signage, etc. at both the vehicular and pedestrian level
- Historical/cultural signage
- Commercial signage
- Recreational asset signage
- Public facility signage e.g. public parking, city hall, fire department, etc.
- Downtown informational/map kiosk

**Background:**

Founded in 1824, the City of Perry is located in Houston County in the heart of Middle Georgia. The historic community currently encompasses 16.4 square miles along Interstate 75 approximately 90 miles south of Atlanta. Perry has been able to capitalize on proximity to Robins Air Force Base, excellent schools, unique downtown, high quality of life, and location in transforming from a small town to a vibrant and growing community of nearly 15,000 people. As a hub of state and federal highways, home of the Georgia National Fairgrounds & Agricenter and the Georgia Artisans Center, and with events like the Dogwood Festival, the Perry Music Festival, and the annual Perry Buzzard Drop New Year's Eve bash, Perry is "Where Georgia Comes Together".

Historic Downtown Perry, a bustling commercial core surrounded by historic, traditional neighborhoods, is the economic anchor of a commercial environment with approximately 641 businesses. Though well-rounded in its composition, the Perry economy is driven by tourism, with nearly 1 million people visiting every year for events at the Georgia National Fairgrounds & Agricenter, and Robins Air Force Base, the 24,000-employee economic engine located in Houston County. There are also a number of large employers in Perry including Perdue Farms, Frito Lay, and Graphic Packaging.

Perry is growing and growing quickly. The City of Perry is growing at a rate exceeding that of Houston County, the Middle Georgia Region, the State of Georgia, and the U.S. In regards to population, the City of Perry is expected to grow at a rate of 1.5% per year. The fastest growing population segment is for people 20 – 34 years of age and our largest demographic are those persons known as "Middleburg" which have a median age of 35.3, are mostly well-educated young couples, and have a relatively high median household income.

Beyond the strong economic situation, much of this growth can be attributed to the high quality of life found in Perry. Perry is continuously lauded as one of the safest communities in Georgia and amongst the best small towns in Georgia. With a focus on public spaces, parks, and recreational offerings, the City of Perry offers a wide range of recreational and leisure

opportunities. Houston County Schools are among the best in Georgia and The Westfield School offers a sound private school option. You will also find a broad-range of post-secondary educational opportunities nearby. Organizations like the Perry Area Historical Society, Perry Players Community Theatre, and the Perry Public Arts Commission serve to round out a community experience that is difficult to surpass.

Beginning in December 2014, in part as a revitalization of efforts undertaken in 2013, the City of Perry Wayfinding Committee was reconstituted with the goal of establishing a Wayfinding Plan for the City that would lay the groundwork for a subsequent wayfinding system. Meeting regularly through September 2015, this working group brought together a variety of community interests and perspectives in putting together the City of Perry Wayfinding Plan.

Implementing the Wayfinding Plan, the community hopes to develop a wayfinding system that will bring people, residents and visitors alike, into Perry to conduct business, visit, recreate, sightsee, eat, shop, etc. The design and implementation of a wayfinding system is a priority in multiple guiding documents in including the *City of Perry Strategic Plan and Implementation Program* and the *City of Perry Masterplan*.

With the Wayfinding Plan developed, the City chose to delay implementation so that a concurrent initiative, the Perry Branding Initiative, which will heavily influence the creative and design aspects of the Wayfinding System, could be completed. With the Perry Brand in place the City is ready to move forward with the Wayfinding System.

### **Project Description:**

The City of Perry seeks to design and implement a comprehensive signage system that facilitates wayfinding throughout the City. This wayfinding signage system should address the needs of Perry residents and visitors using all modes of transportation. Street level vitality, legibility, safety, maintenance and replacement costs are all major concerns in creating an informational signage and wayfinding system that is both direct and friendly. The wayfinding and signage system should integrate Perry Brand elements and should be easily expanded upon as the City grows. The project should consider a variety of sign types including, but not limited to:

- General wayfinding signage e.g. directional signage, informational signage, gateway signage, etc. at both the vehicular and pedestrian level
- Historical/cultural signage
- Commercial signage
- Recreational asset signage
- Public facility signage e.g. public parking, city hall, fire department, etc.
- Downtown informational/map kiosk

The City of Perry Wayfinding Plan will serve as a guiding document in the development and implementation of the system and the City of Perry Wayfinding Committee will provide guidance and oversight to the process. As costs are a concern, the project will be implemented in phases. It will also be necessary to assist the City in identifying sign fabrication/installation firms and working with said firms in implementing the system.

The wayfinding/signage system will be implemented City-wide and replace all current City signage. The plan should consider existing signage locations, the possibility of locating signage on existing poles, and responsiveness to mode of travel, traffic patterns, surrounding land uses, as well as maintaining pedestrian travel and ADA accessibility. Price of fabrication and

installation, and the ease and cost of changing and maintaining signage, should also be considered.

## **Project Scope:**

### *Phase 1: Analysis and Program Development*

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- Conduct an on-site kickoff meeting and site analysis.
- Learn how people will enter and leave the area and move between the destinations, developing circulation patterns.
- Discuss maintenance, budget, schedule and phasing issues with City of Perry staff.
- Review the City of Perry Wayfinding Plan.
- Discuss the project with Wayfinding Committee members.
- Identify user groups, their specific needs, and potential wayfinding difficulties, particularly as they affect the disabled, senior citizens, staff, and visitors.
- In coordination with the Wayfinding Committee, develop formula and policy to determine which destinations should be included on signs.
- Review destination names and suggest alternate terms that might clarify wayfinding, if necessary.
- Work to incorporate Perry Brand into wayfinding system and sign design.
- Determine what sign types and wayfinding elements will be needed.
- Evaluate requirements for the signage as relates to the Perry Land Development Ordinance and all pertinent Houston County/GDOT/USDOT requirements.
- Meet with representatives of any regulatory agencies having jurisdiction over the right-of-ways or visual characteristics of the signage.
- Evaluate feasibility of reusing existing locations, poles, hardware on an individual location basis.
- Analyze existing traffic patterns and means of accessing Downtown Perry, map recommended locations for signage directing users to the downtown.
- Develop a hierarchy of information.
- Develop a Project Schedule.
- Develop the preliminary wayfinding logic.

*Deliverables:* Wayfinding Analysis and Recommendations Document (hard copy and editable digital copy) including an evaluation of the existing system, users' needs, destinations, signage requirements, regulatory and jurisdictional issues, recommendations for creative design; and a detailed schedule for project completion, including team members' roles and time commitments, and key meetings and milestones. Also, a detailed site plan (with rationale for boundaries) showing public circulation patterns, primary public destinations, and community access points, and a detailed site plan showing existing signage locations that will or will not be reused.

### *Phase 2: System Design Development*

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- Analyze architectural elements, materials, themes, and the new Perry Brand creative elements and guidelines in order to develop an appropriate design aesthetic for the system.
- Review the Perry Land Development Ordinance and ensure signage is appropriate thereof.
- Prepare detailed designs for various sign types, including distinct prototypes for the Historical signage and Parking signage system.

- Present three initial design concepts for review (Committee selects one initial design concept for additional refinements).
- Complete up to two rounds of refinements.
- Apply the approved design to the remaining sign types.
- Present the full sign type array and mock-up signs.
- Revise the individual sign type designs once more (if needed).

*Deliverables:* Final signage designs with written statement regarding rationale for design choices, materials, and how systems can be modified over time; scaled mockups of potential sign types and concepts; and a statement of probable cost for the fabrication, installation and maintenance of the system, including number of various sign types and locations.

### *Phase 3: Pre-Production*

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- Create finalized, detailed specifications and creative elements for final signage designs (exact dimensions, letter heights, materials, mounting details, color specifications, and material performance standards). Remit all necessary elements to the City of Perry.
- Prepare Sign Location Plans, Sign Phasing Plan, and Sign Message Schedules.
- Develop Bid Documents for a competitive bidding process for signage fabrication and installation.
- Verify the Statement of Probable Cost for the fabrication and installation of signage.

*Deliverables:* Final Bid Documents, verification of the Statement of Probable Cost, and Implementation Phasing Plan that includes priorities in terms of sites and sign location. This plan should include details for location such as distance from a point of interest, location on a one-way street, conflicts with existing infrastructure, etc.

### *Phase 4: Implementation*

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- Work in coordination with the City to finalize and issue a Request for Proposals to firms for the fabrication and installation of signage.
- Work in coordination with the City in receiving and evaluating all proposals received.
- Consult with the City and selected fabrication/installation firm during fabrication and installation process.
- Coordinate any required modifications that the fabricator may need to make.

*Final Deliverables:* City of Perry Wayfinding and Signage Manual that serves as a guide for implementing and maintaining the new wayfinding system. Manual should include system summary, map of sign locations and content, drawings and creative elements of each type of sign, recommendations for future project expansion, best practices and recommendations regarding sign placement, method of updating/replacing signs, etc. The manual should be provided in both hardcopy and electronically. The electronic document should be provided in both PDF and editable Word formats. Scaled and mounted mapping documents should also be provided.

## Submittal Requirements

Proposers must submit nine (9) identical paper copies of the proposal, along with an electronic submittal. The following items must be included, along with other material to demonstrate proposer's expertise and capability:

**1. Description of Approach:** Section describing the intended approach and methods for the project. The description should also include the proposed schedule for the work and list of products to be produced including:

- Tasks to be performed and timeline for each task to be completed
- Methods proposed to use to manage the project and communicate with City staff and the public as to project progress and conduct of public meetings
- Data/information/resources the consultant expects the City of Perry to provide

**2. Team Qualifications:** Description of the proposed team members from the staff of the proposer and any subcontractors who will be responsible for specific work tasks. Provide specific information on the project manager who would be responsible for the project. Provide general information on others on the team including their qualifications, the multi-disciplinary nature of the team assembled for this project, and specific evidence of relevant experience designing and implementing wayfinding signage and systems. Include names with contact information (phone and email) of three past client references, preferably municipalities.

**3. Description of Comparable Projects:** Summary of comparable wayfinding system projects in progress or completed are to be submitted with the following information for each:

- Reference name, with current contact information
- Client type
- Overview of process of wayfinding system/signage design and implementation
- Size and scale of geographic area for which the wayfinding system was installed
- General overview of wayfinding system and signage numbers (e.g. number of pedestrian level signs downtown, etc.) and examples of signage design
- Status report on system design/implementation

**4. Sample Wayfinding System Documents:** Please include samples of final deliverables from the list of comparable projects. If these deliverables differ from what was ultimately adopted by the clients, please provide examples of each and a brief explanation.

**5. Schedule:** Provide a schedule of activities to include project milestones and an overall timeframe for completion of the project.

**6. Project Cost:** Submission should include a detailed description of the proposed cost for the services requested. It should identify the total cost for completing each defined work task separately including direct and indirect costs. The proposal should be signed by the person responsible for the decisions as to costs and services being offered.

**7. False or Misleading Statements:** Vendors must take great care to ensure that sufficient information has been provided to allow the City to evaluate the technical solution being offered, any options proposed, pricing of all offerings, all supporting information, technical documentation, references, points of contact, corporate capabilities, etc.

Vendor understands that the City reserves the right, in its sole discretion, to reject any proposal, if, in the opinion of the City, such proposal contains false or misleading information of any kind, or does not contain sufficient detail to fully evaluate the technical solution or proposed price. Vendors also understand that if the information provided does not support a function, attribute, capability, or condition as proposed by the vendor, the City may reject the proposal and any work conducted to the point wherein the vendor assumes the sole responsibility of said work and/or related expense.

**8. Addenda and Supplements to this Request for Proposal:** If it becomes necessary to revise any part of this request for proposal, an addendum will be provided to all who requested or received copies of this request. The City will not be responsible for any oral or other unofficial interpretation of any element of this RFP or its related documentation.

**9. No Obligation to Buy:** The City reserves the right to refrain from contracting with any vendor. The release of this RFP does not compel the City to purchase any products or services.

**10. Withdrawal of Proposals:** Vendors may withdraw a proposal that has been submitted at any time up to the proposal closing date and time. To withdraw a proposal, a written request signed by an authorized representative of the vendor must be submitted to the RFP contact. Upon withdrawal of a proposal, the vendor may submit another proposal at any time up to the proposal closing date and time.

**11. Cost of Preparing Proposals:** The City is not liable for any costs incurred by vendors in the preparation and presentation of proposals submitted in response to this RFP.

**12. Damage Liability:** The successful vendor is liable and responsible for any damage to the premises (e.g., floor, walls, ceiling, etc.) caused by vendor personnel or equipment during installation, and is responsible for the removal of all project-related debris. The vendor shall be responsible to the City or related third party for any property damage or bodily injury caused by it, any of its sub-contractors, employees, or agents in the performance of, or as a result of, the work performed. Vendor will furnish copies of, and maintain in full force and effect, certificates of insurance, demonstrating general liability insurance, and naming the City as payee in the amount of not less than \$1,000,000. Vendor shall defend, indemnify, and hold harmless the City from and against claims arising directly or indirectly from the contract and associated work performed. Vendor shall be solely responsible for all local taxes or contributions imposed or required under the Social Security, Workers' Compensation, and income tax laws.

**13. Permits:** The vendor shall obtain and pay for any permits and licenses required for the performance of the work, post all notices required by law, and comply with all laws, ordinances, and regulations bearing on the conduct of the work, as specified herein. For any work that requires an inspection certificate issued by local authorities or any other governing body, such inspection certificate(s) shall be obtained by and paid for by the vendor. The chosen vendor shall procure all required certificates of acceptance or completion issued by state, municipal, or other authorities, and must deliver these to the City.

**14. Insurance:** The vendor shall, at vendor expense, procure and maintain satisfactory public liability and casualty insurance to adequately protect the vendor's personnel and the City against damages for bodily injury, including death, that may arise from operations under this contract, whether such operations are by the vendor or by the vendor's subcontractor, or anyone directly or indirectly employed by the vendor.

The City will require the vendor with which a contract is established to provide evidence of appropriate professional liability insurance, errors and omission insurance, and workers' compensation insurance coverage prior to commencement of work.

Such coverage must be provided by an insurance company or companies authorized to do business in the State of Georgia. Certificates must name the City as an Additional Insured, shall provide that contractor's policy is primary over any insurance carried by the City, and shall provide that the policy will not be cancelled or materially changed without 30 days prior notice in writing to the City. The successful vendor must agree, if awarded a contract as a result of its proposal, to indemnify and hold harmless the City, its officers, agents, and employees from any and all claims and losses accruing or resulting to persons engaged in the work contemplated by its proposal or to persons who may be injured or damaged by the firm or its agents in the performance of the work. Prior to commencement of any work, these and other provisions will be established contractually.

**15. Vendor Responsibility:** Unless otherwise stipulated, vendor shall provide, and pay for, all materials, labor, tools, equipment, transportation, and other facilities necessary for the performance and completion of the work.

**16. Rejection of Proposal:** The City reserves the right to reject any or all proposals, to waive any informality in such proposals, to request new proposals, to revise the RFP prior to the time for final submission of written proposals, to proceed to do the work otherwise, to withdraw this RFP, to not award the contract, to not award a portion or portions of the contract, and/or to negotiate separately with any source whatsoever in any manner necessary to serve the best interest of the City. The City may not award a contract based solely on this request for proposals and will not pay for the information obtained and solicited. The information obtained will be used in determining the proposal that best meets the City's needs. Unauthorized conditions, limitations or provisions attached to a Proposal may render it as not complying with the City's original request and may be subsequently rejected. No oral proposal or modifications to submitted proposals will be accepted.

**17. Submittal Ownership and Disclosure:** All material submitted in response to this proposal becomes the property of City of Perry, is subject to the provisions and limitations of the Georgia Open Records Law regarding retention, release, and disclosure, and will not be returned unless the Proposer requests a withdrawal in accordance with Withdrawal of Proposals section above. Submitted proposals may be reviewed and evaluated by any person at the discretion of the City.

**18. Acceptance of Proposal:** Submission of a proposal constitutes an agreement by the Proposers to each and all of the terms and conditions as set forth in this request. The contents of the proposal of the successful firm shall become contractual obligations upon entering into a written contract with City of Perry. Failure of the successful firm to accept these obligations may result in cancellation of the award.

**19. Completed W-9 Request for Taxpayer Identification Number and Certification**

**20. Completed Contractor Affidavit – E-Verify Request**

**Selection Criteria:**

Qualified candidates will be judged on the following criteria:

- Quality of proposed work plan – 35%
- Experience with wayfinding systems and signage design – 35%
- Cost – 30%

**Review Process:**

The City of Perry will review the proposals and may require follow-up information and/or a meeting with the presenting organization. City staff will make a recommendation to City of Perry Mayor and Council who will make any and all final decisions.

**Questions:**

Questions regarding this request or the wayfinding system in Perry should be directed to Robert Smith, Department of Economic Development with the City of Perry, at (478) 988-2757 or via email at robert.smith@perry-ga.gov.

**Please submit proposal to:**

**City of Perry  
Department of Economic Development  
Attn: Robert Smith  
1211 Washington Street  
P.O. Box 2030  
Perry, Georgia 31069**

**Envelope should be clearly marked: Wayfinding System Proposal**

**Proposals are due July 29, 2016 at 5:00 p.m.**

*The City of Perry is an Equal Opportunity Employer and organization and does not discriminate on the basis of any legally protected characteristic, including but not necessarily limited to race, color, national origin, gender, sexual orientation (to include gender identity), religion, veteran or military status, or the presence of any sensory, mental or physical disability or the use of a trained guide dog or service animal by a person with a disability, will not maintain facilities which are segregated on the basis of race, color, religion or national origin, and will comply with the Americans with Disabilities Act of 1990, as amended, regarding programs, services, activities and employment practices.*

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
 requester. Do not  
 send to the IRS.**

<b>Print or type See Specific Instructions on page 2.</b>	Name (as shown on your income tax return)	
	Business name/disregarded entity name, if different from above	
	Check appropriate box for federal tax classification (required): <input type="checkbox"/> Individual/sole proprietor <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate	
	<input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶	
	<input type="checkbox"/> Other (see instructions) ▶	
Address (number, street, and apt. or suite no.)		Requester's name and address (optional)
City, state, and ZIP code		
List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on the "Name" line to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Social security number									

**Note.** If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Employer identification number									

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶
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### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

#### Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
2. Certify that you are not subject to backup withholding, or
3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,
- The U.S. grantor or other owner of a grantor trust and not the trust, and
- The U.S. trust (other than a grantor trust) and not the beneficiaries of the trust.

**Foreign person.** If you are a foreign person, do not use Form W-9. Instead, use the appropriate Form W-8 (see Publication 515, Withholding of Tax on Nonresident Aliens and Foreign Entities).

**Nonresident alien who becomes a resident alien.** Generally, only a nonresident alien individual may use the terms of a tax treaty to reduce or eliminate U.S. tax on certain types of income. However, most tax treaties contain a provision known as a “saving clause.” Exceptions specified in the saving clause may permit an exemption from tax to continue for certain types of income even after the payee has otherwise become a U.S. resident alien for tax purposes.

If you are a U.S. resident alien who is relying on an exception contained in the saving clause of a tax treaty to claim an exemption from U.S. tax on certain types of income, you must attach a statement to Form W-9 that specifies the following five items:

1. The treaty country. Generally, this must be the same treaty under which you claimed exemption from tax as a nonresident alien.
2. The treaty article addressing the income.
3. The article number (or location) in the tax treaty that contains the saving clause and its exceptions.
4. The type and amount of income that qualifies for the exemption from tax.
5. Sufficient facts to justify the exemption from tax under the terms of the treaty article.

**Example.** Article 20 of the U.S.-China income tax treaty allows an exemption from tax for scholarship income received by a Chinese student temporarily present in the United States. Under U.S. law, this student will become a resident alien for tax purposes if his or her stay in the United States exceeds 5 calendar years. However, paragraph 2 of the first Protocol to the U.S.-China treaty (dated April 30, 1984) allows the provisions of Article 20 to continue to apply even after the Chinese student becomes a resident alien of the United States. A Chinese student who qualifies for this exception (under paragraph 2 of the first protocol) and is relying on this exception to claim an exemption from tax on his or her scholarship or fellowship income would attach to Form W-9 a statement that includes the information described above to support that exemption.

If you are a nonresident alien or a foreign entity not subject to backup withholding, give the requester the appropriate completed Form W-8.

**What is backup withholding?** Persons making certain payments to you must under certain conditions withhold and pay to the IRS a percentage of such payments. This is called “backup withholding.” Payments that may be subject to backup withholding include interest, tax-exempt interest, dividends, broker and barter exchange transactions, rents, royalties, nonemployee pay, and certain payments from fishing boat operators. Real estate transactions are not subject to backup withholding.

You will not be subject to backup withholding on payments you receive if you give the requester your correct TIN, make the proper certifications, and report all your taxable interest and dividends on your tax return.

#### **Payments you receive will be subject to backup withholding if:**

1. You do not furnish your TIN to the requester,
2. You do not certify your TIN when required (see the Part II instructions on page 3 for details),
3. The IRS tells the requester that you furnished an incorrect TIN,
4. The IRS tells you that you are subject to backup withholding because you did not report all your interest and dividends on your tax return (for reportable interest and dividends only), or
5. You do not certify to the requester that you are not subject to backup withholding under 4 above (for reportable interest and dividend accounts opened after 1983 only).

Certain payees and payments are exempt from backup withholding. See the instructions below and the separate Instructions for the Requester of Form W-9.

Also see *Special rules for partnerships* on page 1.

### **Updating Your Information**

You must provide updated information to any person to whom you claimed to be an exempt payee if you are no longer an exempt payee and anticipate receiving reportable payments in the future from this person. For example, you may need to provide updated information if you are a C corporation that elects to be an S corporation, or if you no longer are tax exempt. In addition, you must furnish a new Form W-9 if the name or TIN changes for the account, for example, if the grantor of a grantor trust dies.

### **Penalties**

**Failure to furnish TIN.** If you fail to furnish your correct TIN to a requester, you are subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect.

**Civil penalty for false information with respect to withholding.** If you make a false statement with no reasonable basis that results in no backup withholding, you are subject to a \$500 penalty.

**Criminal penalty for falsifying information.** Willfully falsifying certifications or affirmations may subject you to criminal penalties including fines and/or imprisonment.

**Misuse of TINs.** If the requester discloses or uses TINs in violation of federal law, the requester may be subject to civil and criminal penalties.

### **Specific Instructions**

#### **Name**

If you are an individual, you must generally enter the name shown on your income tax return. However, if you have changed your last name, for instance, due to marriage without informing the Social Security Administration of the name change, enter your first name, the last name shown on your social security card, and your new last name.

If the account is in joint names, list first, and then circle, the name of the person or entity whose number you entered in Part I of the form.

**Sole proprietor.** Enter your individual name as shown on your income tax return on the “Name” line. You may enter your business, trade, or “doing business as (DBA)” name on the “Business name/disregarded entity name” line.

**Partnership, C Corporation, or S Corporation.** Enter the entity's name on the “Name” line and any business, trade, or “doing business as (DBA) name” on the “Business name/disregarded entity name” line.

**Disregarded entity.** Enter the owner's name on the “Name” line. The name of the entity entered on the “Name” line should never be a disregarded entity. The name on the “Name” line must be the name shown on the income tax return on which the income will be reported. For example, if a foreign LLC that is treated as a disregarded entity for U.S. federal tax purposes has a domestic owner, the domestic owner's name is required to be provided on the “Name” line. If the direct owner of the entity is also a disregarded entity, enter the first owner that is not disregarded for federal tax purposes. Enter the disregarded entity's name on the “Business name/disregarded entity name” line. If the owner of the disregarded entity is a foreign person, you must complete an appropriate Form W-8.

**Note.** Check the appropriate box for the federal tax classification of the person whose name is entered on the “Name” line (Individual/sole proprietor, Partnership, C Corporation, S Corporation, Trust/estate).

**Limited Liability Company (LLC).** If the person identified on the “Name” line is an LLC, check the “Limited liability company” box only and enter the appropriate code for the tax classification in the space provided. If you are an LLC that is treated as a partnership for federal tax purposes, enter “P” for partnership. If you are an LLC that has filed a Form 8832 or a Form 2553 to be taxed as a corporation, enter “C” for C corporation or “S” for S corporation. If you are an LLC that is disregarded as an entity separate from its owner under Regulation section 301.7701-3 (except for employment and excise tax), do not check the LLC box unless the owner of the LLC (required to be identified on the “Name” line) is another LLC that is not disregarded for federal tax purposes. If the LLC is disregarded as an entity separate from its owner, enter the appropriate tax classification of the owner identified on the “Name” line.

**Other entities.** Enter your business name as shown on required federal tax documents on the "Name" line. This name should match the name shown on the charter or other legal document creating the entity. You may enter any business, trade, or DBA name on the "Business name/disregarded entity name" line.

## Exempt Payee

If you are exempt from backup withholding, enter your name as described above and check the appropriate box for your status, then check the "Exempt payee" box in the line following the "Business name/disregarded entity name," sign and date the form.

Generally, individuals (including sole proprietors) are not exempt from backup withholding. Corporations are exempt from backup withholding for certain payments, such as interest and dividends.

**Note.** If you are exempt from backup withholding, you should still complete this form to avoid possible erroneous backup withholding.

The following payees are exempt from backup withholding:

1. An organization exempt from tax under section 501(a), any IRA, or a custodial account under section 403(b)(7) if the account satisfies the requirements of section 401(f)(2),
  2. The United States or any of its agencies or instrumentalities,
  3. A state, the District of Columbia, a possession of the United States, or any of their political subdivisions or instrumentalities,
  4. A foreign government or any of its political subdivisions, agencies, or instrumentalities, or
  5. An international organization or any of its agencies or instrumentalities.
- Other payees that may be exempt from backup withholding include:
6. A corporation,
  7. A foreign central bank of issue,
  8. A dealer in securities or commodities required to register in the United States, the District of Columbia, or a possession of the United States,
  9. A futures commission merchant registered with the Commodity Futures Trading Commission,
  10. A real estate investment trust,
  11. An entity registered at all times during the tax year under the Investment Company Act of 1940,
  12. A common trust fund operated by a bank under section 584(a),
  13. A financial institution,
  14. A middleman known in the investment community as a nominee or custodian, or
  15. A trust exempt from tax under section 664 or described in section 4947.

The following chart shows types of payments that may be exempt from backup withholding. The chart applies to the exempt payees listed above, 1 through 15.

IF the payment is for . . .	THEN the payment is exempt for . . .
Interest and dividend payments	All exempt payees except for 9
Broker transactions	Exempt payees 1 through 5 and 7 through 13. Also, C corporations.
Barter exchange transactions and patronage dividends	Exempt payees 1 through 5
Payments over \$600 required to be reported and direct sales over \$5,000 <sup>1</sup>	Generally, exempt payees 1 through 7 <sup>2</sup>

<sup>1</sup> See Form 1099-MISC, Miscellaneous Income, and its instructions.

<sup>2</sup> However, the following payments made to a corporation and reportable on Form 1099-MISC are not exempt from backup withholding: medical and health care payments, attorneys' fees, gross proceeds paid to an attorney, and payments for services paid by a federal executive agency.

## Part I. Taxpayer Identification Number (TIN)

**Enter your TIN in the appropriate box.** If you are a resident alien and you do not have and are not eligible to get an SSN, your TIN is your IRS individual taxpayer identification number (ITIN). Enter it in the social security number box. If you do not have an ITIN, see *How to get a TIN* below.

If you are a sole proprietor and you have an EIN, you may enter either your SSN or EIN. However, the IRS prefers that you use your SSN.

If you are a single-member LLC that is disregarded as an entity separate from its owner (see *Limited Liability Company (LLC)* on page 2), enter the owner's SSN (or EIN, if the owner has one). Do not enter the disregarded entity's EIN. If the LLC is classified as a corporation or partnership, enter the entity's EIN.

**Note.** See the chart on page 4 for further clarification of name and TIN combinations.

**How to get a TIN.** If you do not have a TIN, apply for one immediately. To apply for an SSN, get Form SS-5, Application for a Social Security Card, from your local Social Security Administration office or get this form online at [www.ssa.gov](http://www.ssa.gov). You may also get this form by calling 1-800-772-1213. Use Form W-7, Application for IRS Individual Taxpayer Identification Number, to apply for an ITIN, or Form SS-4, Application for Employer Identification Number, to apply for an EIN. You can apply for an EIN online by accessing the IRS website at [www.irs.gov/businesses](http://www.irs.gov/businesses) and clicking on Employer Identification Number (EIN) under Starting a Business. You can get Forms W-7 and SS-4 from the IRS by visiting [IRS.gov](http://IRS.gov) or by calling 1-800-TAX-FORM (1-800-829-3676).

If you are asked to complete Form W-9 but do not have a TIN, write "Applied For" in the space for the TIN, sign and date the form, and give it to the requester. For interest and dividend payments, and certain payments made with respect to readily tradable instruments, generally you will have 60 days to get a TIN and give it to the requester before you are subject to backup withholding on payments. The 60-day rule does not apply to other types of payments. You will be subject to backup withholding on all such payments until you provide your TIN to the requester.

**Note.** Entering "Applied For" means that you have already applied for a TIN or that you intend to apply for one soon.

**Caution:** A disregarded domestic entity that has a foreign owner must use the appropriate Form W-8.

## Part II. Certification

To establish to the withholding agent that you are a U.S. person, or resident alien, sign Form W-9. You may be requested to sign by the withholding agent even if item 1, below, and items 4 and 5 on page 4 indicate otherwise.

For a joint account, only the person whose TIN is shown in Part I should sign (when required). In the case of a disregarded entity, the person identified on the "Name" line must sign. Exempt payees, see *Exempt Payee* on page 3.

**Signature requirements.** Complete the certification as indicated in items 1 through 3, below, and items 4 and 5 on page 4.

**1. Interest, dividend, and barter exchange accounts opened before 1984 and broker accounts considered active during 1983.** You must give your correct TIN, but you do not have to sign the certification.

**2. Interest, dividend, broker, and barter exchange accounts opened after 1983 and broker accounts considered inactive during 1983.** You must sign the certification or backup withholding will apply. If you are subject to backup withholding and you are merely providing your correct TIN to the requester, you must cross out item 2 in the certification before signing the form.

**3. Real estate transactions.** You must sign the certification. You may cross out item 2 of the certification.

**4. Other payments.** You must give your correct TIN, but you do not have to sign the certification unless you have been notified that you have previously given an incorrect TIN. "Other payments" include payments made in the course of the requester's trade or business for rents, royalties, goods (other than bills for merchandise), medical and health care services (including payments to corporations), payments to a nonemployee for services, payments to certain fishing boat crew members and fishermen, and gross proceeds paid to attorneys (including payments to corporations).

**5. Mortgage interest paid by you, acquisition or abandonment of secured property, cancellation of debt, qualified tuition program payments (under section 529), IRA, Coverdell ESA, Archer MSA or HSA contributions or distributions, and pension distributions.** You must give your correct TIN, but you do not have to sign the certification.

### What Name and Number To Give the Requester

For this type of account:	Give name and SSN of:
1. Individual	The individual
2. Two or more individuals (joint account)	The actual owner of the account or, if combined funds, the first individual on the account <sup>1</sup>
3. Custodian account of a minor (Uniform Gift to Minors Act)	The minor <sup>2</sup>
4. a. The usual revocable savings trust (grantor is also trustee) b. So-called trust account that is not a legal or valid trust under state law	The grantor-trustee <sup>1</sup> The actual owner <sup>1</sup>
5. Sole proprietorship or disregarded entity owned by an individual	The owner <sup>3</sup>
6. Grantor trust filing under Optional Form 1099 Filing Method 1 (see Regulation section 1.671-4(b)(2)(i)(A))	The grantor*
For this type of account:	Give name and EIN of:
7. Disregarded entity not owned by an individual	The owner
8. A valid trust, estate, or pension trust	Legal entity <sup>4</sup>
9. Corporation or LLC electing corporate status on Form 8832 or Form 2553	The corporation
10. Association, club, religious, charitable, educational, or other tax-exempt organization	The organization
11. Partnership or multi-member LLC	The partnership
12. A broker or registered nominee	The broker or nominee
13. Account with the Department of Agriculture in the name of a public entity (such as a state or local government, school district, or prison) that receives agricultural program payments	The public entity
14. Grantor trust filing under the Form 1041 Filing Method or the Optional Form 1099 Filing Method 2 (see Regulation section 1.671-4(b)(2)(i)(B))	The trust

<sup>1</sup> List first and circle the name of the person whose number you furnish. If only one person on a joint account has an SSN, that person's number must be furnished.

<sup>2</sup> Circle the minor's name and furnish the minor's SSN.

<sup>3</sup> You must show your individual name and you may also enter your business or "DBA" name on the "Business name/disregarded entity" name line. You may use either your SSN or EIN (if you have one), but the IRS encourages you to use your SSN.

<sup>4</sup> List first and circle the name of the trust, estate, or pension trust. (Do not furnish the TIN of the personal representative or trustee unless the legal entity itself is not designated in the account title.) Also see *Special rules for partnerships* on page 1.

\*Note. Grantor also must provide a Form W-9 to trustee of trust.

**Note.** If no name is circled when more than one name is listed, the number will be considered to be that of the first name listed.

### Secure Your Tax Records from Identity Theft

Identity theft occurs when someone uses your personal information such as your name, social security number (SSN), or other identifying information, without your permission, to commit fraud or other crimes. An identity thief may use your SSN to get a job or may file a tax return using your SSN to receive a refund.

To reduce your risk:

- Protect your SSN,
- Ensure your employer is protecting your SSN, and
- Be careful when choosing a tax preparer.

If your tax records are affected by identity theft and you receive a notice from the IRS, respond right away to the name and phone number printed on the IRS notice or letter.

If your tax records are not currently affected by identity theft but you think you are at risk due to a lost or stolen purse or wallet, questionable credit card activity or credit report, contact the IRS Identity Theft Hotline at 1-800-908-4490 or submit Form 14039.

For more information, see Publication 4535, Identity Theft Prevention and Victim Assistance.

Victims of identity theft who are experiencing economic harm or a system problem, or are seeking help in resolving tax problems that have not been resolved through normal channels, may be eligible for Taxpayer Advocate Service (TAS) assistance. You can reach TAS by calling the TAS toll-free case intake line at 1-877-777-4778 or TTY/TDD 1-800-829-4059.

#### Protect yourself from suspicious emails or phishing schemes.

Phishing is the creation and use of email and websites designed to mimic legitimate business emails and websites. The most common act is sending an email to a user falsely claiming to be an established legitimate enterprise in an attempt to scam the user into surrendering private information that will be used for identity theft.

The IRS does not initiate contacts with taxpayers via emails. Also, the IRS does not request personal detailed information through email or ask taxpayers for the PIN numbers, passwords, or similar secret access information for their credit card, bank, or other financial accounts.

If you receive an unsolicited email claiming to be from the IRS, forward this message to [phishing@irs.gov](mailto:phishing@irs.gov). You may also report misuse of the IRS name, logo, or other IRS property to the Treasury Inspector General for Tax Administration at 1-800-366-4484. You can forward suspicious emails to the Federal Trade Commission at: [spam@uce.gov](mailto:spam@uce.gov) or contact them at [www.ftc.gov/idtheft](http://www.ftc.gov/idtheft) or 1-877-IDTHEFT (1-877-438-4338).

Visit [IRS.gov](http://IRS.gov) to learn more about identity theft and how to reduce your risk.

### Privacy Act Notice

Section 6109 of the Internal Revenue Code requires you to provide your correct TIN to persons (including federal agencies) who are required to file information returns with the IRS to report interest, dividends, or certain other income paid to you; mortgage interest you paid; the acquisition or abandonment of secured property; the cancellation of debt; or contributions you made to an IRA, Archer MSA, or HSA. The person collecting this form uses the information on the form to file information returns with the IRS, reporting the above information. Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation and to cities, states, the District of Columbia, and U.S. possessions for use in administering their laws. The information also may be disclosed to other countries under a treaty, to federal and state agencies to enforce civil and criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism. You must provide your TIN whether or not you are required to file a tax return. Under section 3406, payers must generally withhold a percentage of taxable interest, dividend, and certain other payments to a payee who does not give a TIN to the payer. Certain penalties may also apply for providing false or fraudulent information.

**Contractor Affidavit under O.C.G.A. § 13-10-91(b)(1)**

By executing this affidavit, the undersigned contractor verifies its compliance with O.C.G.A. § 13-10-91, stating affirmatively that the individual, firm or corporation which is engaged in the physical performance of services on behalf of City of Perry has registered with, is authorized to use and uses the federal work authorization program commonly known as E-Verify, or any subsequent replacement program, in accordance with the applicable provisions and deadlines established in O.C.G.A. § 13-10-91. Furthermore, the undersigned contractor will continue to use the federal work authorization program throughout the contract period and the undersigned contractor will contract for the physical performance of services in satisfaction of such contract only with subcontractors who present an affidavit to the contractor with the information required by O.C.G.A. § 13-10-91(b). Contractor hereby attests that its federal work authorization user identification number and date of authorization are as follows:

\_\_\_\_\_  
Federal Work Authorization User Identification Number

\_\_\_\_\_  
Date of Authorization

\_\_\_\_\_  
Name of Contractor

\_\_\_\_\_  
Name of Project

\_\_\_\_\_  
Name of Public Employer

I hereby declare under penalty of perjury that the foregoing is true and correct.

Executed on \_\_\_\_\_, \_\_\_\_\_, 201\_\_ in \_\_\_\_\_ (city), \_\_\_\_\_  
(state).

\_\_\_\_\_  
Signature of Authorized Officer or Agent

\_\_\_\_\_  
Printed Name and Title of Authorized Officer or Agent

SUBSCRIBED AND SWORN BEFORE ME  
ON THIS THE \_\_\_\_\_ DAY OF \_\_\_\_\_, 201\_\_.

\_\_\_\_\_  
NOTARY PUBLIC

My Commission Expires:\_\_\_\_\_