



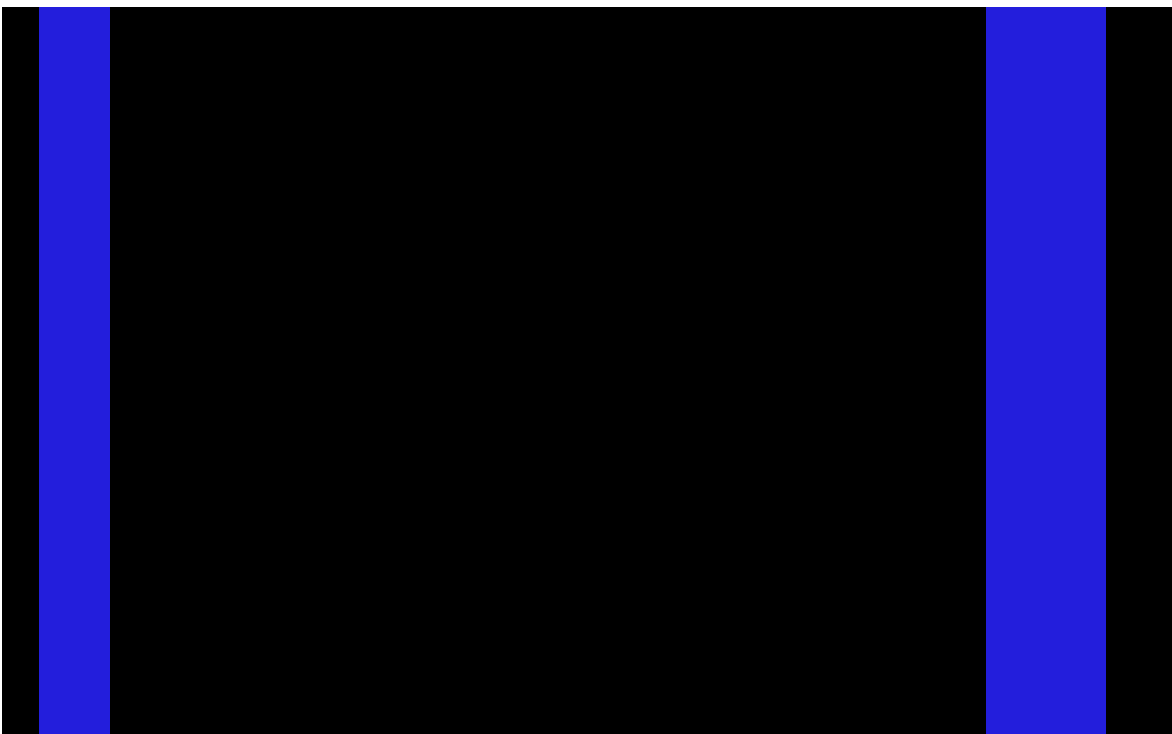
Proposal for RFP 26.149 – Lockout Tagout (LOTO) Written Procedure Development Services

City of Broken Arrow, Oklahoma

Submitted by:
Jacobs

Luke Lenard, PE, Project Director

April 23, 2026





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Suite 290
Tulsa, Oklahoma 74137
T 918.583.3057

April 23, 2026

Kelly Cox
Human Resources Director
City of Broken Arrow
PO Box 610
Broken Arrow, OK 74013

Dear Kelly,

Jacobs is pleased to submit this proposal in response to RFP 26.149 – Lockout/Tagout (LOTO) Written Procedure Development Services. We understand the City of Broken Arrow is seeking a qualified partner to support the development of equipment-specific, OSHA-compliant Lockout/Tagout procedures for machinery located at City Hall and the Field Services Building.

Jacobs brings a strong safety culture, deep regulatory knowledge, and practical field experience supporting municipalities and public agencies. Our approach focuses on delivering accurate, consistent, and user-friendly LOTO procedures that enhance worker safety, reduce operational risk, and support long-term compliance.

We appreciate the opportunity to continue to support the City of Broken Arrow and look forward to working collaboratively to deliver high-quality, field-ready documentation aligned with OSHA requirements and City expectations.

Sincerely,

A handwritten signature in black ink, appearing to read "B. Lenard".

Luke Lenard, PE
Project Director
Jacobs

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1. Organizational Structure

Jacobs is organized to deliver integrated, multidisciplinary solutions for public sector clients through clear accountability, strong technical leadership, and disciplined project management. For this Lockout/Tagout (LOTO) Procedure Development project, Jacobs will utilize a dedicated project team structure that integrates project management, health and safety expertise, electrical engineering, and professional documentation support to ensure accurate, OSHA-compliant, and field-ready deliverables.

Executive oversight is provided by the Project Director responsible for staffing, resource alignment, and overall accountability to the City. A Project Manager serves as the City's primary point of contact and is responsible for scheduling, coordination of site activities, and management of technical staff. This structure ensures timely communication, efficient issue resolution, and adherence to the RFP schedule.

Technical execution is carried out through close collaboration between Jacobs' Health, Safety, and Environment (HSE) professionals and licensed electrical engineers. Jacobs' HSE staff bring extensive experience applying OSHA 29 CFR 1910.147 and state requirements in municipal and industrial environments and routinely evaluate LOTO practices at active facilities. Jacobs' electrical engineers provide the technical capability to accurately identify hazardous energy sources, isolation points, and verification methods across a wide range of mechanical and electrical equipment commonly found in City facilities.

Supporting these efforts, Jacobs' Client Deliverables group produces clear, consistent, and fully editable documentation tailored for field use and long-term maintenance. This team ensures procedures, equipment inventories, and summary reports are user-friendly, suitable for employee training, and consistent with regulatory and industry best practices. Together, this organizational structure enables Jacobs to efficiently perform site assessments, identify and inventory applicable equipment, develop compliant and practical LOTO procedures, and meet the City of Broken Arrow's safety, quality, and schedule requirements.

2. Relevant Experience and Qualifications

Jacobs has extensive experience reviewing and refining equipment-specific lockout/tagout (LOTO) procedures for municipal utilities and similar public-sector organizations, with a focus on protecting workers from hazardous energy while maintaining safe operations across multiple facilities. Our Health, Safety, and Environment (HSE) professionals maintain high-quality training in OSHA and recognized industry safety standards and routinely evaluate and inspect contractor LOTO procedures on active plant and construction sites across the country. This hands-on, field-based experience reinforces practical application of regulatory requirements and supports the development of effective, defensible energy control procedures.

Jacobs' electrical engineering team consists of licensed professional engineers with a strong understanding of OSHA requirements, the National Electrical Code, and related industry standards. Our engineers have experience across a wide range of facilities, from municipal buildings to water and wastewater treatment plants with complex electrical, mechanical, and process equipment. This combined HSE and engineering expertise supports accurate identification of energy sources, isolation points, and verification methods and enables Jacobs to deliver high-quality, field-ready documentation. Procedures and equipment inventories are provided in clear, user-friendly, and fully editable formats to support efficient implementation, employee training, and long-term maintenance by City staff.

Jacobs' Client Deliverables group provides the flexibility and technical proficiency needed to produce high-quality, field-ready documentation tailored to client needs. Our highly professional staff is experienced in rapidly and efficiently developing clear, user-friendly, and fully editable deliverables that support safe execution, training, and long-term program maintenance. The team is adept at producing documents in a wide range of formats and layouts, ensuring consistency, accuracy, and ease of use for field personnel while meeting project schedules and quality expectations.

2.1 Relevant Project Experience

City of Austin Public Works – Austin Water

- Evaluated the existing lockout/tagout (LOTO) program to verify compliance with OSHA hazardous energy control requirements and identify improvement opportunities.
- Supported confined space entry activities involving a sludge hopper, including hazard identification and verification of energy isolation measures.

University of Texas at San Antonio

Annex HVAC Systems

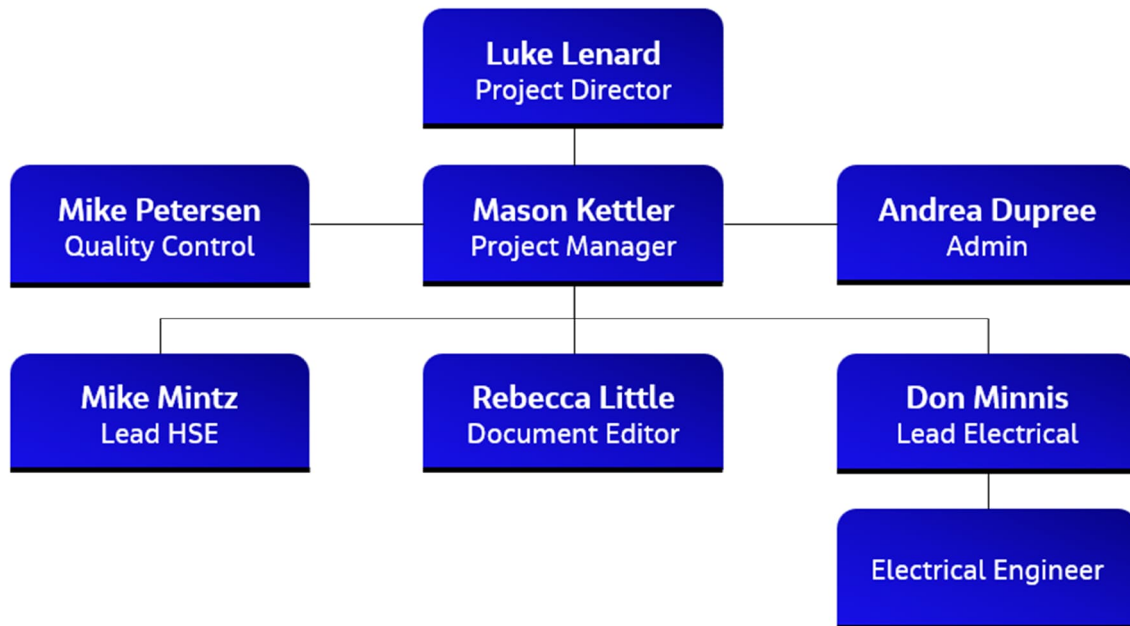
- Reviewed equipment-specific LOTO procedures to ensure effective prevention of inadvertent chiller startup during maintenance activities.
- Supported personnel performing chiller evaluations by verifying isolation points and procedural clarity to reduce exposure to hazardous energy.

Texas Department of Criminal Justice

Project name/topic

- Conducted an independent safety evaluation and provided corrective action recommendations for a prime contractor at the client's request following a high voltage electrical incident.
- Assessed contractor work practices and hazardous energy control measures after an employee electrical shock to identify root causes and prevent recurrence.

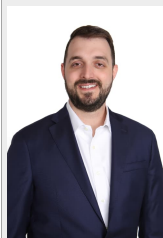
3. Project Team



Luke Lenard, P.E.
Project Director

Luke serves as the Project Director for this project, providing executive oversight for the project, ensuring the team is properly staffed with qualified personnel, that resources are aligned to meet project objectives, and confirming that Jacobs’ deliverables meet the City’s expectations.

Education: MBA Project Management, Louisiana State University – Shreveport
BS Civil Engineering, Louisiana State University



Mason Kettler, P.E.
Project Manager

Mason serves as the Project Manager providing overall project management, scheduling, and staff coordination for this effort.

Education: BS Civil Engineering, University of Oklahoma



Donald Minnis, P.E.
Lead Electrical Engineer

Don is a Senior Electrical Engineer with over 16 years of experience specializing in electrical power, controls, instrumentation, and SCADA systems for municipal water and wastewater facilities. His expertise includes medium- and low-voltage power distribution, motor control centers, standby and emergency power systems, and integrated automation solutions.

Mr. Minnis has led and supported electrical design for a wide range of complex treatment facilities, raw water intakes, pump stations, and regional water infrastructure projects, with construction values up to \$56 million. He has extensive experience developing construction documents, performing power system studies, and coordinating across disciplines to deliver reliable, maintainable, and code-compliant systems. He is a member of IEEE.

Education: BS Electrical Engineering, University of Houston



Mike Mintz
Lead HSE

Mike has more than 30 years of health, safety, and environmental (HSE) experience across construction and general industry environments, including extensive work on municipal, industrial, marine, transportation, healthcare, and utility infrastructure projects. He has served as Health and Safety Manager on numerous complex projects, providing HSE planning, regulatory compliance support, on-site safety audits, contractor oversight, and implementation of project-specific health and safety programs.

Mr. Mintz has deep knowledge of OSHA standards and industry best practices, and is highly experienced in hazard identification, risk assessments, confined space entry planning, and fall protection. He is also a qualified accident investigator with experience ranging from property damage incidents to complex, multi-fatality events, applying root cause analysis to prevent future occurrences. His background includes frequent field inspections and evaluation of contractor safety programs on active plant and construction sites, supporting consistent and defensible safety performance.

Education: Associate, Instructor of Technology and Military Science, Community College of the Air Force

Associate, Occupational Safety and Health, Community College of the Air Force

Associate, Avionics Electronics, Community College of the Air Force

4. Understanding of Scope and Methodology

Jacobs understands that this project includes on-site assessments at City Hall and the Field Services Building; identification and inventory of machinery requiring equipment-specific Lockout/Tagout procedures; evaluation of hazardous energy sources; and development of OSHA 29 CFR 1910.147 and OAC 380:40-122 compliant LOTO documentation delivered in editable Word and field-ready PDF formats.

We understand that the City has not provided a predefined inventory of equipment and that the final scope will be confirmed through coordinated site visits and equipment walkthroughs.

Scope of Services Outline

- Kickoff meeting and site visit preparation
- Site visit
- Develop individualized lockout/tagout procedures for all equipment on the inventory list
- Summary report
- Final deliverables

5. Work Plan, Approach, and Timing

Our approach is focused on the development of OSHA-compliant lockout/tagout (LOTO) procedures that protect employees from hazardous energy while supporting safe and efficient operation of City of Broken Arrow facilities. Jacobs will execute the work through a structured four-phase methodology designed to identify energy hazards, establish effective energy control measures, and deliver clear, usable documentation in accordance with OSHA 29 CFR 1910.147 and industry best practices.



5.1 Kickoff Meeting and Site Visit Preparation

The kickoff meeting will align stakeholders on the objectives, scope, roles, schedule, and communication protocols. Following kickoff, Jacobs will review existing City LOTO practices against applicable federal and state regulatory requirements, such as OSHA 29 CFR 1910.147 and OAC 380:40-1-22, to identify gaps and non-compliance in policies and procedures, equipment isolation methods, and employee responsibilities. This assessment will identify strengths, weaknesses, and inconsistencies across facilities and procedures. The findings will be used to establish a baseline for improvement and alignment with best practices and regulatory standards.

5.2 Site Visit

- **Identify hazards associated with hazardous energy sources.**

Jacobs and City staff will identify energy sources present with the City Hall and the Field Services Building including electrical, mechanical, hydraulic, pneumatic, thermal, etc.

- **Identify all equipment and machinery that require individualized LOTO procedures.**

An inventory will be created to list all machines, systems, and equipment that require lockout/tagout controls during service and maintenance. The inventory will identify and document items that require a site-specific and/or task-specific LOTO procedure. Each item on the inventory will be assessed for its equipment type; description; location; voltage panel; breaker; disconnect type; and LOTO procedure.

5.3 Develop Procedures

- **Develop standardized, equipment specific LOTO procedures**

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Jacobs will develop individual LOTO procedures for equipment identified at the two facilities (City Hall and Field Services Building). These procedures will include:

- Equipment identification (name, location, ID if applicable)
- Type(s) of hazardous energy
- Detailed shutdown procedures
- Isolation steps
- Lockout/tagout application steps
- Stored energy release methods
- Verification of isolation
- Restart procedures

Procedures will be written in plain language and supported by photographs, diagrams, and standardized formatting to ensure they are easy to understand and follow.

▪ **Summary Report**

Jacobs will prepare a comprehensive summary report documenting the work performed, identifying gaps between the City's existing lockout/tagout (LOTO) program and applicable OSHA and Oklahoma Administrative Code (OAC) requirements, and providing prioritized recommendations to achieve and sustain regulatory compliance. In addition, Jacobs will assist the City by identifying OSHA-compliant training programs suitable for City staff, helping to reduce the cost of on-site training while providing greater flexibility to minimize operational disruptions.

5.4 Schedule

We understand the City is working within a defined timeline and will work collaboratively to align project activities with the schedule identified in the RFP.

Anticipated Contract Award	May 5, 2026
Project Kickoff	May 6, 2026
Site Visits	May 6 – May 8, 2026
Draft Procedure Delivery	June 1, 2026
Final Deliverables	June 5, 2026

5.5 Assumptions and Exclusions

- All applicable fuses and panels will be labeled by City staff prior to the site visit.
- 28 procedures were assumed for cost development for both facilities.
- Physical modification of equipment is excluded from the scope. OSHA and ANSI standards make clear that LOTO programs focus on administrative and procedural controls rather than engineering redesigns or hardware alterations. Any modifications, such as installing new isolation devices, adding lockable disconnects, or upgrading control systems, fall under engineering or maintenance responsibilities and must be managed by qualified personnel under separate authorization.

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- Training delivery and enforcement activities are also excluded unless specifically added through a contract amendment. The Consultant may provide training materials and guidance, but the City retains responsibility for conducting training sessions, verifying employee competency, and enforcing disciplinary measures. Jacobs will recommend an OSHA certified training program that best fits the City's needs.
- Electrical or engineering design services are excluded from this scope, as these activities fall outside the boundaries of administrative program development. Tasks such as designing electrical isolation points, modifying circuitry, performing arc-flash calculations, or specifying engineered safety devices must be completed by qualified engineers under separate authorization. The Consultant's role is limited to documenting existing energy control points and recommending administrative improvements, not altering system design.
- The City retains full responsibility for implementing the LOTO program and ensuring ongoing compliance. OSHA clearly states that employers are accountable for establishing, enforcing, and maintaining an effective energy control program, including training, inspections, and corrective actions. While the Consultant provides expert guidance, documentation, and recommendations, the City must ensure that procedures are followed, employees are trained, and the program is integrated into daily operations.

6. References

City of Broken Arrow

Tim Robins, PE – trobins@brokenarrow.gov – 918-644-6494

City of Oklahoma City

Josh Morgan – josh.morgan@okc.gov – 405-297-1222

City of Tulsa

Matt Vaughan – mvaughan@cityoftulsa.org – 918-596-9845

Austin Water

Matthew Scharf - matthew.Scharf@austintexas.gov - 512-801-0567

Sam Shorter, PE – Sam.Shorter@austintexas.gov - 512-829-1329

7. Cost Effectiveness


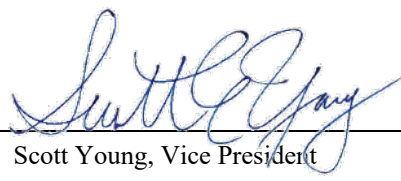
Because a predefined equipment inventory has not been provided, Jacobs proposes pricing on a per-equipment basis. Final project costs will be based on the number of qualifying equipment items confirmed during site assessments. Any services requested outside the defined scope will be addressed through mutually agreed-upon supplemental pricing.

Kickoff Meeting	\$4,280.00
Site Visits	\$39,010.00
Site Visits	\$16,480.00
Equipment Inventory List - City Hall	\$9,530.00
Equipment Inventory List - Field Operations Center	\$9,530.00
Evaluate Energy Sources Review	\$3,470.00
Draft Procedure Delivery	\$36,750.00
City Hall – Assumed 28 Procedures	\$15,210.00
Field Operations Center – Assumed 28 Procedures	\$15,210.00
Summary Report	\$6,330.00
Final Procedure Delivery	\$14,220.00
City Hall - Assumed 28 Procedures	\$4,980.00
Field Operations Center - Assumed 28 Procedures	\$4,980.00
Summary Report	\$4,260.00
Expenses	\$5,500.00
Total	\$99,760.00

Additional Services

Additional Site Visit (4 days) with Two Staff	\$20,500.00
Equipment Inventory Per Facility	\$10,000.00
Individual LOTO Procedures Per Procedure	\$850.00

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 _____	<u>04/23/2026</u>	 _____	<u>04/23/2026</u>
Vibhuti Pandey, Manager of Projects	Date	Scott Young, Vice President	Date