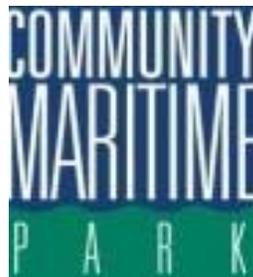


# Statement of Interest and Qualifications for Community Maritime Park Construction Owners Representative

RFQ No. 2009-01  
May 27, 2009 4:00 PM

For the Vince Whibbs, Sr. Community Maritime Park Project

Submitted to:



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# ARCH

250 PARKWAY DRIVE, SUITE 160  
LINCOLNSHIRE, IL 60069  
TEL 847.541.3220 FAX 847.541.3221  
[www.archltd.com](http://www.archltd.com)

ARCH CONSULTANTS LTD  
GUIDING THE BUILDING PROCESS  
FROM VISION TO OCCUPANCY

## **ORGANIZATION, HISTORY AND PERSONNEL**

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ARCH Consultants, Ltd. is an independent and autonomous development consulting and construction management firm with in-depth experience and expertise in commercial, senior living, healthcare, education, and other institutional facilities projects. Founded by Frank Muraca in 2002, ARCH has brought dozens of projects to successful completion, skillfully leading design and construction teams to meet owner goals with respect to quality, budget and schedule.

Mr. Muraca was trained as an architect and began his professional practice as a designer before transitioning to project management early in his career. Over the years, he has designed and built libraries, schools, police stations, auditoriums and other stand-alone civic structures, but has specialized in senior living environments, which combine residential, dining, entertainment, office, retail, health care and minor medical facilities. Additionally, he has worked with clients, community groups and governments across America in consensus-building, entitlements and other exercises necessary to develop support for projects.

In 2003 John Peacock joined ARCH after a distinguished career at OWP&P, a well known Chicago architecture firm, and where he had previously worked with Mr. Muraca. John had also started out as a designer before transitioning to project management. His experience is very similar to Frank's, with the same broad exposure to a variety of public and institutional mixed-use developments. He has brought both a strong focus on the details relating to design and a powerful presence in on-site construction monitoring to ARCH.

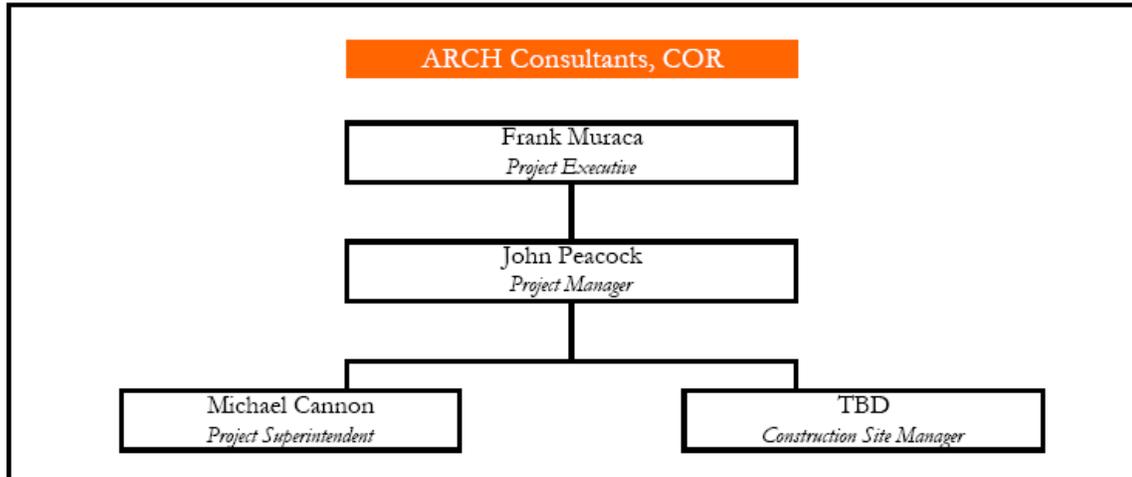
Michael Cannon joined ARCH in 2008, continuing a career that began as a contractor and construction manager, detoured into a law practice as a transactional and litigation attorney specializing in construction law, and returning to construction management as an owner's representative. Mr. Cannon combines practical construction experience with an unusually comprehensive understanding of the rights and responsibilities of the project participants, as well as an approach to risk management that benefits the owner throughout the project.

Our key personnel are a carefully selected, highly-experienced group of professionals, each of whom has shown great competence, flexibility and determination to succeed. Each of our managers has specific experience relevant to the work described in the solicitation, and our team has the depth to handle a project the size of Maritime Park. We have complimented our talents with procedures necessary to facilitate workflows and track progress as the project moves from design to construction. ARCH has developed a technologically sophisticated construction management practice, using scheduling and project management software that is accessible remotely. Also, we have a web-based, customizable network platform available for project participants to post and exchange documents and other communications.

Relying on extensive experience and careful analysis, ARCH can help the Board and its Staff to articulate a vision for the project and establish criteria relating to scope, budget, schedule and performance before any work begins. Then we will be your gatekeeper, continually reviewing and reassessing project costs, quality, completion milestones, and usage requirements to see that your criteria are being met and that your vision is realized.

Our Mission is to: provide a broad range of high quality, fully integrated, experience-based development and construction consulting services; deliver high-quality and cost-effective results that meet each client's goals as Owner's Representatives; employ and support motivated, flexible, and focused teams of professionals, providing the highest standard of services available in the industry and developing solutions that are unique to each project; and to conduct our business in a manner consistent with the trust and respect placed in us by our clients, maintaining our culture and reputation for professionalism, integrity and success.

As owner's representatives, we are in a unique position in the development process, advocating for our client in interactions with designers, builders, governmental agencies and lenders, while managing risks, mediating disputes and driving progress. More than anything else, ours is a communication business. The success of any project depends on the ability of the various team members to provide input, debate and criticism, and our role is to be the Owner's advocate, introducing an experienced and professional guiding hand to ensure that the process is productive and the inevitable disputes are resolved to the Owner's ultimate benefit.



## **BIOGRAPHIES**

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## FRANK MURACA, AIA, LEED AP

Frank Muraca's interest in design and construction started early in his professional life, beginning at a law firm where he worked on real estate transactions as a clerk, and later as an intern at an architectural practice, drafting plans. As an architect, he spent 10 years as a designer of projects, at firms including OWP&P and McBride & Kelley.

Over time he began moving from design to management, leading teams of designers. Eventually, he led a consulting division within a full service architecture and engineering firm, specializing in development.

His interests in development management led him to Owners Services Group, a construction consulting firm, where he led efforts in owner's representation on numerous projects, employing varying design and construction delivery methods.

In 2001 he formed ARCH Consultants, Ltd., as a building and project management consulting firm. At ARCH he has built a wide variety of building types, but has specialized in building senior environments. This has enabled him to manage new construction and remodeling of occupied facilities, and to continue to expand his experience with mixed-use buildings, as each project typically involves residential, commercial, dining and food service, fitness, health care, auditorium and light retail components.

Mr. Muraca has provided the following services on projects: architectural drawings, CADD technician standards, construction inspector, construction management, cost estimating, health facility planning, interior design, project management, scheduler, specifications writer, and value engineering. Frank is also a LEED AP and is experienced in sustainable design. He has published articles and presented topics on project management and planning practices for building and development at regional and national forums.

### Education

Mr. Muraca received his Bachelor of Arts and Sciences degree from Loyola University and his Master of Architecture degree from the Illinois Institute of Technology.

### Professional Affiliations

Frank is a licensed architect (IL 001.016723), a member of the American Institute of Architects, and a LEED Accredited Professional. His professional associations include AHA, AAHSA, USGBC and the Urban Land Institute.

### Publications

*An Integrated Approach to Building, Nursing Homes Long Term Care Management*, June 2007

*Controlling Budgets to Maximize Quality, Assisted Living Success*, November 2002

*Program Development, Site Assessment Among Critical Elements for Project Planning*, The Business Ledger, Oak Brook, IL 2001

### Speaking Engagements

*Making a Business Case for Green Buildings*, LSNI, March 2007

*Construction Primer*, Ziegler Conference, Amelia Island, FL, October 2006

*Banking Overview and Construction Consultant Oversight*, ULI, Salt Lake City, UT, May 2006

*Property Evaluation: Site Assessment and Land Due Diligence*, AAHSA, San Antonio, TX, November 2005

*All Aboard! How to Effectively Communicate the Building Process with Residents, Staff and Board*, LSNI, Chicago, IL, April 2002

*The Development Process and the Financial Time Line, and Design and Construction Delivery Methods*, LSNI, April 1998

## JOHN J. PEACOCK, AIA

John Peacock is a Principal and Senior Project Manager at ARCH Consultants. He has over 25 years experience in building construction and holds a Master of Architecture degree from the University of Illinois. He began his career in 1977 as a draftsman in an architecture firm that included a thriving design/build practice, where he continued to work part time while working to achieve his degree in architecture. Eventually he became a project architect, working on a variety of residential, commercial and institutional projects.

In 1987 he joined OWP&P, a large and well-established Chicago architecture firm. There, he became a project director/manager leading teams of designers in healthcare, corporate, and education projects ranging up to \$30 million in construction costs. Significantly, while at OWP&P he was the Managing Architect for Additions and Special Projects, leading teams renovating schools and athletic facilities for the Chicago Public Schools. John has received Order of Excellence Awards from Contemporary Long Term Care for the Warren Barr Pavilion (Best Interior Design) and Meadow View Lodge at Heritage Village (Assisted Living Architecture) as part of the project teams.

Since he joined ARCH in 2003, John has led our Project Management teams in facility assessments, field operations, monitoring the construction of large and complex mixed-use development projects. His vast experience in design and in on-site construction management has been invaluable to our clients. John has also laid the framework for assessment, planning and implementation of a wide array of projects and has acted as facilitator for programming, design and budgeting. He is particularly experienced in identifying and resolving code compliance issues as well as working through the complex issues associated with sealing the building envelope for greater energy efficiency.

### Education

Mr. Peacock received his Bachelor of Science in Architecture and his Master of Architecture degree from The University of Illinois.

### Professional Affiliations

John is a licensed architect (IL 001.013003), and a member of the American Institute of Architects. His professional associations include AAHSA and USGBC.

### Current Project Experience

The Landing at Plymouth Place - Project manager for a \$150 million mixed use project that includes housing, dining, clinic, pool, underground parking, and long term care.

Town Centers - Project manager for two mixed use developments that includes housing, restaurants, swimming, banking, commercial and parking with total project cost \$60 million.

### Speaking Engagements and Publications

*Preparing for Illinois' New Assisted Living Regulations*, Life Services Network, Illinois

*Special Design Features and Conversions*, Illinois Health Care Association's Assisted Living Symposium

*Life Safety Code - What I Don't Know Can Hurt Me*, - Life Services Network, Illinois

*An Alzheimer Unit-Summerfield, Kansas*, Elder Design

*The Nursing Station of Today, an Interview with John Peacock, AIA*, Elder Design

*Redefining the Nurse Station*, Nursing Homes Long Term Care Managements

## MICHAEL R. CANNON, JD, LEED AP

Michael Cannon has been a general contractor, owner's representative, EPC contractor's construction manager and a lawyer representing design professionals, owners, contractors and subcontractors. His construction management experience varies broadly, including residential, retail, commercial, mixed-use and industrial projects.

Mr. Cannon grew up working in the construction trades and continued working on construction projects as an undergraduate at the University of Texas. Upon moving to Chicago in 1994 he formed his own construction company, specializing in residential renovations and additions. In 1996 he went to work for a major developer as the company's sole construction manager, in charge of renovations, upgrades and the repurposing of a \$100,000,000 portfolio of property in Chicago's historic River North neighborhood.

On graduating from law school in 2000 he became an Assistant State's Attorney, first in the criminal appeals division, then in Labor & Employment, and finally in the Complex Litigation Unit, where he represented Cook County in construction disputes. In private practice from 2002 to 2007, Michael specialized in construction law, particularly representing architects and engineers in professional liability disputes and in claims of personal injury as well as contractors and subcontractor in transactions and litigation involving construction defects, payment disputes and property damage claims. His interest in sustainability and efficiency in design and construction led him to become a LEED Accredited Professional.

In 2007 he co-founded Viridios, Ltd. and embarked on a project in Kuwait, where he managed the construction phase of \$225,000,000 fuel-oil power plant. Mr. Cannon came into the project after delays threatened to bring about early termination and implementation of \$1,230,000 per day penalties. By revising the schedule, re-sequencing activities, marshalling additional resources and personally overseeing daily progress in the field, he got the project back on track within just a few months, without compromising quality.

Michael joined ARCH Consultants in 2008, bringing his unique perspective on practical construction,

risk management and transactions to a number of projects. With ARCH he has managed development processes, negotiated contracts, assembled development teams and monitored progress throughout construction. He has been an effective advocate for owners in dealing with contractors, subcontractors, designers and other stakeholders in various projects. These projects have involved both new construction and renovation requiring systems upgrades and replacement, as well as abatement of hazardous materials.

Along with the basic management, leadership, communication and interpersonal skills necessary to lead project teams, Mr. Cannon understands the rights and responsibilities of real estate development participants and the importance of risk management in construction. He has met project goals with respect to time, budget and quality. Significantly, he has also dealt with the consequences of a party's failure to meet those goals. The combination of a legal background with practical construction experience has enhanced his effectiveness as a project manager.

### Education

Mr. Cannon earned his B.A. degree in Government from the University of Texas at Austin and his J.D. degree from Loyola University Chicago School of Law, where he was also the recipient of a Corboy Fellowship.

### Professional Affiliations

United States Green Building Council,  
LEED Accredited Professional  
American Bar Association,  
Forum on the Construction Industry  
Illinois State Bar Association  
Licensed to practice law in Illinois (6272022) and in  
Federal court.

### Speaking Engagements and Writing

Mr. Cannon's seminar presentations include *The Use and Misuse of Contingency and Allowance in Construction Contracts* and *Lien Waivers and Sworn Statements*. He has lectured on project delivery method selection as a risk management measure, as well as on construction contract drafting. He also wrote for a presentation to major insurers, *Construction Law and Mold Litigation*.

## INVOLVEMENT & AVAILABILITY

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Frank Muraca will be Project Principal, managing the relationship, executing contracts and providing high-level oversight. John Peacock will be the Project Manager, coordinating the work and interfacing with the design team. Michael Cannon will be the Project Superintendent, working with the contractor on the site and providing construction monitoring through final occupancy and post-construction. Additionally, we plan to add a local site superintendent to our team during the construction phase of the work, drawing from the talent pool available in the Pensacola area. We will be looking particularly for qualified small, minority and local business participation.

Upon award of the contract for COR services, the entire ARCH team will meet with the CMPA Board and its staff and consultants to gain a better understanding of the background and purpose of the project and its various component parts. Our goal will be to represent and protect the interest of CMPA and the City of Pensacola in regards to the Community Maritime Park Project.

We will meet with City Staff and Consultants – both in person and by teleconference, as appropriate – throughout the process of determining which project delivery method to select, and will continue to do so during discussions with the potential Developer and possible Design/Builders or Contractors. We anticipate that some issues will be best served by meeting face-to-face, while others can be handled just as effectively by telephone or email. Some phases of our work on the Project will require more time on site and in meetings, while others will be better handled from our offices. Our Work Plan will budget our time accordingly. Needless to say, we will always be available to meet the needs of the Board, its Staff and Consultants, and the Project.

As the Project progresses, different members of our team will increase their level of involvement as necessary to provide the best level of service. For example, negotiation of Design/Build and GMP contracts will be handled by Frank Muraca and Michael Cannon. Oversight of performance of design and construction contracts will be managed by John Peacock and Michael Cannon. Mr. Peacock will have primary responsibility for monitoring compliance with design guidelines, with support from Mr. Muraca. Mr. Muraca is particularly experienced with budgeting, while Mr. Peacock is especially accomplished in scheduling. Mr. Cannon has a strong background in dispute resolution, which is important since he will work with the local construction site manager in providing day-to-day construction oversight and will be the principle liaison with the contractors, facilitating decision making and trouble-shooting during construction.

Plainly, we have the depth to handle anything that comes up during the course of development, combining some degree of specialization with enough overlapping skill sets to be sure that the CMPA and the City will have top-quality representation at all times.

During selection of project delivery method and contract negotiation Mr. Cannon and Mr. Muraca will focus on providing for the CMPA's needs with respect to phasing, schedule, materials, approach, price, terms and deliverables, helping CMPA manage the risks associated with committing to a costly, complicated and time-consuming undertaking.

In preconstruction, the ARCH team will be dedicated to monitoring risk, cost, quality and mitigating possible delay. We will assess cost impacts of design decisions and will guide discussions of staging, phasing and sequencing of construction operations with the goal of providing the most efficient process and the shortest schedule. As cost estimates are developed, we will evaluate and analyze those estimates and will lead value engineering efforts to get the best possible end product that the budget will allow. As the design develops, we will work with the City and CMPA staff to obtain regulatory approvals, including environmental permits, zoning and land use. Throughout this process we will continue to monitor the design team's compliance with the Design Criteria approved by the CMPA. We will advise the CMPA and its staff on any

proposed changes to the Design Criteria, as well as changes to the scope and program, and any requested change orders.

When plans and specifications are produced, we will review them and make recommendations to the CMPA and the design team, and will review any special instructions to contractors.

As construction progresses, ARCH will provide continuing assistance, counseling and reports to the CMPA regarding the course and conduct of the work, including timelines, milestones, quality, apparent validity of estimates and the relationship of costs to budgets. While ARCH will have no control or authority over safety, and thus cannot accept any responsibility for safety, we can report on the apparent effectiveness of the safety program.

We will conduct regular meetings with the Master Developer, CMPA, City and others, and will assist CMPA staff with overseeing and administering the Master Development Agreement and construction contracts, including a Design/Build Agreement, as necessary.

ARCH will review payment applications and make recommendations as appropriate regarding payment for work on the Project, based on regular site visits and written progress reports. We will also make recommendations regarding expenditures from contingency funds. We will endeavor to resolve any disputes between and among the design and construction teams to reduce the potential for impact on schedule, budget or quality.

As the Project winds down, we will monitor completion of the work, report on our observations, and will oversee the close-out procedures of the designers and builders.

## **FIRM EXPERIENCE**

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Managing the construction of mixed-use projects is simply what we do. We are a firm of professionals dedicated to providing high quality and cost effective owner's representation services to institutions and communities with high standards, well-defined budgets and strict deadlines. Each of our project managers has experience building mixed-use developments. We all have knowledge of design principles and have conducted design reviews. We have negotiated and managed design-build agreements, overseen design, engineering and construction general contracts, and have monitored compliance with design guidelines.

Our projects range in size from \$30,000,000 to \$200,000,000 and nearly all are mixed use developments. On every project we manage budgets, schedules and communications.

Each of our key personnel possesses extensive, detailed experience in on-site, day-to-day construction oversight, trouble-shooting, decision making and conflict resolution of large, complex, mixed-use projects. We always view our role as being the liaison with the developers and builders on all aspects of the design, engineering, procurement and construction of every project. Working for the CMPA, we will emphasize those issues that may impact the developer's ability to fulfill his commitments, with a focus on adherence to budget and schedule, and maintaining the high standards of quality that the CMPA deserves.

The following projects are representative of our recent experience with large scale, mixed-use development:

### **THE LANDING AT PLYMOUTH PLACE, LAGRANGE PARK, IL**

Eight-story mixed-use facility providing core administrative offices, library, activities, cafeteria, entertainment, exercise, limited retail, indoor parking and some independent living apartments to a continuing care retirement community in approximately 490,000 square feet, with 347 units, located in LaGrange Park, Illinois. ARCH was Owner's Representative from beginning to end, monitoring the \$146,000,000 development through construction to final occupancy in November 2008. ARCH assisted the owner with everything from fundamental project planning to procurement of low voltage equipment and coordinating installation, all the way to move-in.

This project is relevant to the CMPA because the mixed-use structure contains a variety of spaces, such as office, auditorium, retail, grand entry, cafeteria and library that may be found at Maritime Park.

### **TOWN CENTER AT COVENANT VILLAGE OF NORTHBROOK, IL**

New construction of a \$33,000,000, three-story mixed-use structure providing core administrative offices, library, activities, cafeteria, auditorium, exercise, limited retail, indoor parking and some independent living apartments to a continuing care retirement community town center with 44 residential apartments, approximately 130,000 square feet. Preparation for construction required demolition and environmental remediation of the site. Additionally, upon completion of the building an adjacent structure also required environmental (asbestos) remediation, which has just been performed in advance of its scheduled demolition later this month. ARCH continues in its role as the development advisor - heavily involved with planning, financing and marketing - in addition to serving as construction manager. Phased occupancy began in January, with all spaces available for occupancy by late March of 2009.

This project is relevant to the CMPA because the mixed-use structure contains a variety of spaces, such as office, auditorium, retail, grand entry, cafeteria and library that may be found at Maritime Park.

**THE NEW ADMIRAL AT THE LAKE, CHICAGO, ILLINOIS**

New Construction of 624,000 square foot luxury retirement community in a state-of-the-art, 32-story tower on Chicago's lakefront. This project involves a health care center, fitness, multiple dining options, indoor structured parking, townhomes and independent living residences along with skilled nursing and memory care, plus retail and garden space. The New Admiral has a development budget of over \$200,000,000 and a projected construction start date of October of this year.

ARCH became involved just before demolition of another structure on the site, negotiated terms with the general contractor, and has carefully monitored the progress of design and cost estimating as the owner's representative. The work on this project has been especially challenging, as the economic slowdown has impacted the bond market, necessitating repeated value engineering exercises and careful reexamination of schedule and construction sequencing. ARCH has provided the owner with disciplined, knowledgeable and experienced guidance throughout this process, managing the design and pre-construction teams in their efforts.

**THE HOLMSTAD OF BATAVIA, IL**

New construction of a \$28,000,000, three-story mixed-use structure providing core administrative offices, library, activities, cafeteria, auditorium, exercise, limited retail, indoor parking and some independent living apartments to a continuing care retirement community town center with 48 residential apartments, approximately 140,000 square feet. ARCH was the development advisor - heavily involved with planning, financing and marketing - in addition to serving as construction manager. Phased occupancy began in October, 2008, with all spaces available for occupancy by January of 2009.

This project is relevant to the CMPA because the mixed-use structure contains a variety of spaces, such as office, auditorium, retail, grand entry, cafeteria and library that may be found at Maritime Park.

## APPROACH & SERVICES

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Throughout the development process, we give careful attention to the course of the work and its compliance with the design intent and the construction documents, with a careful eye for detail and an understanding of the owner's priorities. We have the technical expertise to anticipate problems and the judgment to implement solutions at every stage of the process. We are particularly adept at managing this process to minimize disputes and efficiently resolve them whenever they arise, so that the work continues uninterrupted and payment can be distributed without unnecessary delay. These practices facilitate the analysis and processing of proposed change orders, cost and schedule adjustments and scope changes.

One way that we continually work to meet client expectations is through regular reporting of status and progress. In these reports we can convey the results of inspections, surveys, testing, achievement of milestones, potential problems and recommended solutions, illustrated with photographs where appropriate.

Our services are organized into six process management phases described below. These phases are comprised of certain elements ARCH typically sees in a project. From project scope definition through ongoing due diligence in planning and implementation, ARCH orchestrates the building process to move it forward efficiently and to improve dramatically the likelihood of accomplishing the program and achieving quality goals on time and within budget.

### **Phase One: Assessment**

#### 1. Property Evaluation

ARCH assesses property identified for the project and evaluates its consistency with the anticipated project design.

### **Phase Two: Pre-Design Phase**

#### 2. Conceptual Construction Opinion

ARCH participates in meetings and discussions to facilitate incorporating programming needs into a definition of project size and quality and prepares a conceptual construction opinion stating the scope of the work required for the project.

#### 3. Construction Management Plan

ARCH prepares a construction management plan, using the schedule, budget, general design requirements and a preliminary cost estimate, and considering site use and improvements and providing an analysis of costs related to efficiency, usable life, maintenance, energy and operations. The construction management plan presents various scheduling (including a pre-bid construction schedule), management, delivery method, design and construction alternatives, and makes recommendations as to each.

#### 4. Master Schedule

ARCH prepares a master schedule for each component of the project, specifying the proposed start and finish dates for certain, key activities.

### **Phase Three: Design Phase**

As a basic service that we believe is essential to our success, every project includes some degree of design and constructability review during the design phase. Working with project designers and specialized subcontractor consultants where appropriate, we systematically pore through drawings and prepare comments and raise concerns having to do with everything from code compliance, constructability and value engineering to space planning and the particular needs of specific users. With our extensive experience as designers and builders, we bring a higher level of ability to this process, resulting in a better quality environment, delivered sooner and at a better price.

Our design phase services also include cost estimating, analysis and control, procurement of energy and utility studies, site investigations and surveys, review of scope changes and analysis of schedule impact and, where applicable, market studies.

5. Project Conference

ARCH conducts a project conference attended by CMPA, Developer and design professional. During the project conference, ARCH reviews and discusses the project objective, including: the construction management plan, conceptual construction opinion, total project budget and master schedule.

6. Design Phase Information

As Construction Manager, ARCH monitors the design professional's compliance with the project objectives and coordinates and expedites the flow of information between CMPA and the design professional and others.

7. Design Phase Project Meetings

As part of its continuing gatekeeping function as Construction Manager, ARCH conducts regular project conferences attended by CMPA, Developer and the design professional. During these project conferences, ARCH reviews and discusses the project criteria, including such matters as scope definition the construction management plan, conceptual construction opinion, total project budget and master schedule, as they relate to the project. As Construction Manager, ARCH monitors the design professional's compliance with the pertinent project criteria and coordinates and expedites the exchange of information between CMPA, Developer and the design professional. ARCH conducts monthly meetings attended by CMPA, Developer and the design professional. ARCH prepares and distributes minutes of these meetings as a regular report to CMPA, Developer and the design professional.

8. Review of Design Documents

As the design professional works on developing the project design, ARCH expedites CMPA 's project design review by conveying comments to the design professional. ARCH works with CMPA in reviewing the project design documents for clarity, consistency, constructability, and for compliance with the project criteria. These project design reviews are performed at the end of the schematic design, design development and construction document phases under the design professional's contract. The results are recorded in meeting minutes and as notations on the design documents.

9. Cost Control & Budget Management

While the design professional completes and submits separate elements of the project design drawings and specifications, ARCH solicits estimates of their construction cost. ARCH coordinates activities of CMPA, Developer and the design professional in making changes to the project design required to meet the total project budget criteria. Similarly, ARCH analyzes and reports to CMPA, Developer and the design professional regarding the costs of various design and construction alternatives. As a part its cost analysis, ARCH considers costs related to efficiency, usable life, maintenance, energy and operation, as well as the impact on the total project budget and master schedule.

10. Cost and Schedule Terms Review

ARCH assists in reviewing the terms related to cost and schedule in draft contract documents provided by the design professional, and recommends modifications consistent with the project objective wherever necessary.

11. Construction Sequence Recommendations

ARCH makes recommendations and advises the design professional with respect to sequence of construction and construction duration.

12. Revisions to Master Schedule

Throughout construction, ARCH recommends revisions to the master schedule in conjunction with the project objective and updates it as necessary.

### 13. Coordination of Approvals by Regulatory Agencies

ARCH oversees the transmittal of construction documents to regulatory agencies for review and advises CMPA of potential problems of which ARCH is made aware, and suggests solutions regarding completion of such reviews.

### **Phase Four: Pre-Construction Phase**

#### 14. Pre-Construction Conference

In consultation with CMPA, Developer and the design professional, ARCH conducts a pre-construction conference, during which ARCH reviews the project reporting procedures and other rules.

### **Phase Five: Construction Phase**

Management of the construction process is fundamental to our services. Construction is a detail-oriented business, requiring a systematic approach to the management and analysis of critical path method scheduling and schedule reviews, estimating and cost control, correspondence, inspections, payments, change orders, phasing requirements, test dates, inspections, etc. It also requires careful consideration of safety programs and demands strict adherence to the policies and practices in place to ensure the safest possible workplace. We monitor compliance and demand comprehensive documentation of the safety program and its implementation.

#### 15. Construction Phase Information, Administration, Procedures and Reporting

ARCH establishes procedures for expediting and monitoring the exchange of information, requests, responses and related documents among Project participants relating to construction phase information, including: requests for information; shop drawings; materials and equipment submittals; contract schedule variations; progress payments; and change orders. ARCH prepares and distributes a monthly report on the progress of the project, including current and past activity in the construction phase information exchange process.

#### 16. On-Site Management

Balancing CMPA's interests in cost control and direct monitoring of the progress of work on the project, ARCH periodically and regularly visits the project site to provide construction representation. On the basis of these on-site observations, ARCH keeps CMPA and the Developer informed of the progress of the work and endeavors to guard CMPA against defects and deficiencies in the work.

#### 17. Construction Phase Project Meetings

ARCH conducts project meetings attended by CMPA, Developer, design professional and subcontractors, as a forum for the exchange of information concerning the project and the review of the construction process. ARCH can prepare and distribute minutes of these meetings or review and comment on draft minutes prepared by the contractor for accuracy and completeness, according to the particular requirements of CMPA.

#### 18. Progress Payment Review

In conjunction with the design professional, ARCH reviews the progress payment applications, making appropriate adjustments to each and preparing a recommendation to CMPA and Developer, based on whether the amount requested accurately reflects the progress of the work.

#### 19. Review Of Requests For Changes To The Work

ARCH reviews the contents of requests for changes to the work, assembles information concerning the requests for CMPA's, Developer's and design professional's review, and makes recommendations with respect to acceptance or rejection of the requests. Should CMPA desire a detailed change order analysis, ARCH reviews all proposed change orders detailed in a request for proposal (RFP) and accompanied by technical drawings

and specifications prepared by the design professional. ARCH makes recommendations regarding whether to proceed with the change and ARCH verifies that work and adjustments of time required by approved change orders have been incorporated into the contract's construction schedule.

20. Quality Review

ARCH monitors the quality control procedures for the construction to verify that the design professional is providing observation and to assist CMPA by reviewing the construction work to determine that when completed, the construction work will conform to the construction documents. ARCH will transmit to a notice of nonconforming work when it is the opinion of ARCH, CMPA, or design professional that the work does not conform to the requirements of the construction documents.

21. Coordination of Other Independent Consultants

ARCH coordinates technical inspection and testing provided by others and receives, analyzes and distributes the reports and other products of that inspection and testing.

22. Substantial Completion, Close-Out And Occupancy

ARCH's general close-out assistance involves monitoring, evaluating, refereeing, and leading the project participants in addressing punch list and warranty items so as to foster group responsibility for identifying and executing appropriate corrective work first while reserving the determination of financial responsibility for the solutions for subsequent discussion and resolution. At the same time, ARCH assists CMPA and the Developer in obtaining an occupancy permit by accompanying governmental officials during inspections of the project.

**Phase Six: Post-Construction**

23. Record Documents, Warranties, And Manuals

ARCH expedites the preparation of and collects from the contractor any record documents, warranties, and any operation and maintenance materials required by the construction contract and assures their delivery to CMPA and the Developer.

24. Close-out Reports

After the design professional determines the contractor's work is final and completed and issues the certificate of final completion and recommends final payment, ARCH prepares a final project accounting and close-out report benchmarking the completed project against the project criteria.

25. Post-Occupancy Evaluations

ARCH prepares a post-occupancy evaluation report of completed projects after occupancy and full turn-over has occurred. The report evaluates how the design in actuality relates to CMPA's operations and the project vision.

**Additional Services**

Should CMPA require other assistance, ARCH also can assist in the following areas:

26. Web-Based Project Management

Project management can be conducted via the internet. Web-based programs can be established to expedite communications for project participants. Log-on and access are customized for the project.

27. FF&E Procurement

ARCH provides procurement services for the order, delivery and installation of furniture, fixtures and equipment ("FF&E") specified by CMPA or the design professional. Equipment may require installation by the contractor. ARCH develops a FF&E purchase order log and schedule to manage the procurement efforts and coordinate with the construction.

28. Management Of Non-Construction Components

In the event CMPA deems coordination is required, ARCH will manage project information technology and/or low voltage systems.

29. Occupancy Plans

ARCH prepares an occupancy plan for CMPA's review and acceptance that includes a schedule for relocation for furniture, equipment, and CMPA's personnel. The plans can also include move relocations if appropriate.

30. Facility Information Technology

ARCH assists in selecting information technology systems for facility management. Programs are customized for the project and include CMPA's staff training on all it applications.

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**REFERENCES**


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**Project**

The Landing at Plymouth Place

New construction of a self-contained continuing care retirement community in a mid-rise, mixed-use structure providing core administrative offices, activities, dining, entertainment, exercise, swimming, limited retail, indoor parking, assisted living apartments, memory care facilities and independent living apartments. Completed November, 2008.

<b>Owner</b>	<b>Architect/Engineer</b>	<b>Contractor</b>
Plymouth Place Senior Living 315 N. LaGrange Road LaGrange Park, IL 60526 Mr. Dale Lilburn 708.482.6668	SAS Architects 630 Dundee Road Suite 110 Northbrook, IL 60062 Mr. Mike Arenson 847.564.8333	Bovis Lend Lease One North Wacker Drive Suite 850 Chicago, IL 60606 Mr. John Morley 312.245.1000

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**Project**

Town Center at Covenant Village of Northbrook

New construction of a mixed-use structure providing core administrative offices, activities, dining, entertainment, exercise, swimming, limited retail, indoor parking and some independent living apartments to a continuing care retirement community. Completed March, 2009

<b>Owner</b>	<b>Architect/Engineer</b>	<b>Contractor</b>
Covenant Village of Northbrook 2625 Techny Road Northbrook, IL 60062 Mr. Neil Warnygora Executive Director 847.412.7005	PFB Architects 224 N Desplaines St Suite 301 Chicago IL 60661 Mr. Steve Johnson 312.376.3100	Walsh Construction 929 West Adams St. Chicago, IL 60607 Mr. Eric Larsen 312.563.5456

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**Project**

The New Admiral at the Lake

New Construction of 624,000 square foot luxury retirement community in a state-of-the-art, 32-story tower on Chicago's lakefront. This project involves a health care center, fitness, multiple dining options, indoor structured parking, townhomes and independent living residences along with skilled nursing and memory care, plus retail and garden space. Construction start projected October, 2009.

<b>Owner</b>	<b>Architect/Engineer</b>	<b>Contractor</b>
The Admiral at the Lake 1055 W. Bryn Mawr Ave, Suite 7 Chicago, IL 60660 Mr. Glenn Brichacek 773.443.1800	Perkins & Will 10100 N. Central Expy. Suite 300 Dallas, TX 75231 Mr. Paul Donaldson 214.283.8769	Bovis Lend Lease One North Wacker Drive Suite 850 Chicago, IL 60606 Mr. Jeff Riemer 312.245.1000

## Project

### The Holmstad of Batavia

New construction of a mixed-use structure providing core administrative offices, activities, dining, entertainment, fitness/wellness, swimming, limited retail, indoor parking and some independent living apartments for a continuing care retirement community. Completed February, 2009.

#### Owner

The Holmstad Retirement  
Community  
700 W. Fabyan Parkway  
Batavia, IL 60510  
Ms. Karen Larson  
630.879.4008

#### Architect/Engineer

Kluber Skahan &  
Associates  
901 N. Batavia Ave.  
Ste. 301  
Batavia, IL 60510  
Mr. Edward Skahan  
630.406.1213

#### Contractor

Walsh Construction  
929 West Adams St.  
Chicago, IL 60607  
Mr. Eric Larsen  
312.563.5456

**SMALL, MINORITY AND LOCAL BUSINESS PARTICIPATION**

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ARCH Consultants intends to team with a local person or business to provide additional services as Site Manager, particularly during the construction phase of the Project. We will be looking particularly for qualified small, minority and local businesses, but have not yet identified the person or business that will best suit the needs of the Project. As the Board has the right to accept or reject any personnel, we would hope for some assistance in locating the best person or organization for the job.