



**QUALIFICATIONS FOR**

**CONSTRUCTION OWNERS  
REPRESENTATIVE**

**FOR THE**

**COMMUNITY MARITIME  
PARK PROJECT**

**RFQ No. 2009-01**

**SUBMITTED BY**



**OWNER SERVICES GROUP, INC.**

Altamonte Capital Center  
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Construction Owners Representative for  
The Community Maritime Park Proposal  
Pensacola, FL  
RFQ No. 2009-01**

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**OWNER SERVICES GROUP, INC.**  
*Objectively Managing the Building Process*

May 22, 2009

Mr. Edward E. Spears  
Administrator  
**COMMUNITY MARITIME PARK ASSOCIATES, INC.**  
Neighborhood & Economic Development Division  
City of Pensacola  
5<sup>th</sup> Floor, City Hall  
222 West Main Street  
Pensacola, FL 32502

**RE: RFQ Construction Owners Representative for the Community Maritime Park Project**  
**RFQ No. 2009-01**

Dear Mr. Spears and Selection Board:

It is easy to see that the citizens of the City of Pensacola are eager to move forward on the development of Community Maritime Park. That community support makes the job of Community Maritime Park Associates (CMPA) easier when it comes to financing, but holds CMPA to a higher standard of performance and transparency than ever. The Covenant with the Community provides a solid basis for communication and commitment.

We are honored to be able to submit our credentials that will briefly outline our seventeen years experience in providing owners representative services to clients providing them with communications tools and transparency.

We also bring our proprietary tool, The Stratos Initiative™, to the project. This tool has been developed through our extensive experience and expertise in the field.

We have prepared our proposal simply, providing a straight forward description of capabilities to satisfy the requirements of the Request for Qualifications. Our organization and the staff proposed for the assignment have extensive experience with various construction support services including owner's representation, value engineering, project controls and cost estimating/constructability reviews in addition to having an in-depth knowledge of LEED certifications requirements.

We have assembled a strong team to address all issues of concern to the Community Maritime Park Associates and are confident that our technical qualifications, relevant experience, personnel qualifications, and resources are ideal for accomplishing all of your goals.

My team and I look forward to developing a long-term working relationship with Community Maritime Park Associates. If you have any questions or require additional information, please feel free to contact me directly at (407) 869-9774.

Respectfully submitted,

A handwritten signature in black ink that reads 'Paul James' in a cursive script.

Paul James  
**OWNER SERVICES GROUP, INC.**

An affiliate of Construction Cost Systems, Inc.

# **Qualifications and Experience**

## **Tab 1**

# *Staff/Team Qualifications and Experience*

## **A. EDUCATION AND QUALIFICATIONS OF INDIVIDUAL STAFF MEMBERS**

At Owner Services Group, Inc. (OS) we pride ourselves on finding the best people for the job. We look at the combination of education and experience. We know that both are important and that field experience is vital to the success of an Owners Representative.

Our Project Executive, Scott Johnston, has a degree in architecture from Auburn University and more than 15 years experience in development and construction. In addition Scott brings a wealth of personal experience in the development of waterfront projects including three in Florida's Panhandle.

Our Project Manager, Kenneth Hester, brings a wealth of education and experience to the team. He is an expert in his field and understands pre-construction and construction processes very well.

Our team also includes Jehle-Halstead, Inc. (JHI) who are site improvement and environmental contamination experts. Mr. Donald P. Jehle, PE will be the environmental expert on our team. Mr. Jehle is a Florida Registered Engineer specializing in hydrology and environmental contamination. He is from Pensacola and very familiar with the project site and the contamination issues associated with the site and the impact on Pensacola Bay.

JHI is a general, civil engineering and surveying firm that offers a full range of services including planning, design, permitting, and construction administration. Their client base is composed of federal, state and local governmental agencies, school systems, public and private utility operators, architects, residential and commercial developers, and industry.

Our team also includes Construction Cost Systems, Inc. (CCS) who are cost management experts. Mr. Steve Losie will be Senior Project and Cost Manager on our team. Mr. Losie has over 22 years of industry experience and is LEED certified.

CCS is an independent consulting firm specializing in the preparation of construction cost estimates at all phases of design. Among the largest cost management firms in the United States, CCS has been providing owners and industry professionals with detailed, objective information that represents the scope, complexity and quality anticipated for their projects since 1979.

Full resumes for these key personnel are listed at the end of this section.

## **B. DEMONSTRATED KNOWLEDGE OF OVERALL SCOPE OF WORK REQUIRED**

We understand that there are some significant points for the owners representative to consider for the development of Community Maritime Park:

1. The 32-acre waterfront site is environmentally contaminated and has been polluting Pensacola Bay.
2. The Conceptual Design and Design Criteria Packages are completed and have been adopted by the Pensacola City Council and ratified, via referendum, by the citizens of Pensacola.
3. A Master Developer will be under contract to design, construct, operate and manage the Community Maritime Park.
4. The site has a rich history spanning more than 450 years.
5. Public financing has been authorized.
6. Construction is slated to begin in the summer of 2009.



# Staff/Team Qualifications and Experience

## **C. DEMONSTRATED SPECIALIZED EXPERTISE OF THE COMPANY, PRINCIPALS AND PROJECT STAFF PROVIDING OWNERS REPRESENTATION FOR DESIGN AND CONSTRUCTION AS PRIMARY LINE OF BUSINESS OR PRIMARY CONTRACTED SERVICE.**

See answer to Section D below.

## **D. DEMONSTRATED KNOWLEDGE OF THE PRINCIPLES AND PRACTICES OF CONSTRUCTION OWNERS REPRESENTATION, SPECIFICALLY, RELEVANT ENGINEERING, ARCHITECTURE AND RELATED PRINCIPLES, CONSTRUCTABILITY AND MEANS AND METHODS, PRODUCTIVITY, SCHEDULING, PROCUREMENT MANAGEMENT, CONSTRUCTION LABOR ISSUES, SAFETY AND, ESPECIALLY, COST MANAGEMENT AND VALUE ENGINEERING OF LARGE PUBLIC WORKS AND MULTI-USE PROJECTS.**

### **OS Executive Summary**

Founded in 1992, OS exists to represent owners by leading the project planning, design, and construction process. We first establish projects goals and then manage all project design and construction participants to meet or exceed our client's expectations relative to scope, quality, cost and schedule. Our staff includes Strategic Planners, Project Managers, Cost Managers, Schedulers, Construction Managers, and Architects. This multi-disciplined team enables us to represent owners on an expert-to-expert basis throughout the project process.

### **What Do We Do?**

OS provides the critical management and decision support services essential to achieving project goals. We have developed a systematic approach to managing the entire design and construction process. Our services include:

#### **Pre-Design Phase Management**

Project Definition & Scope Determination  
Cost Analysis & Budget Preparation  
Design Professional Selection  
Fiscal Risk Management

#### **Design Phase Management**

Design Professional Coordination  
Project Delivery Recommendation  
Design Document & Quality Review  
Cost Control  
Schedule Development  
Fiscal Risk Minimization Strategies  
Safety Plan Development

#### **Bidding and Award Phase Management**

Bidder Pre-Qualification  
Bid Recommendation  
Schedule Review

#### **Construction Phase Management**

On-Site Construction Administration  
Project Meeting Coordination  
Progress Payment Evaluation  
Critical Communication Management  
Critical Issue Resolution  
Quality Review  
Change Order Control  
Schedule Monitoring and Work Out Strategies

#### **Post-Construction Phase Management**

Substantial and Final Completion Monitoring  
Operation & Maintenance Material Collection  
Close-Out Report Preparation

### **What Makes Us Different?**

- Our company and resources are strategically organized to represent Owners
- Objectivity: an unbiased perspective ensures actionable information and informed decision-making
- Planning: we believe in early definition of the Owner's objectives
- Process: we apply fundamental process management principals to meet or exceed all Owner objectives
- Expert-to-expert capability in all design and construction disciplines



# *Staff/Team Qualifications and Experience*

## **E. DEMONSTRATED KNOWLEDGE WITH PERTINENT FEDERAL, STATE AND LOCAL LAWS AND ORDINANCES GOVERNING DEVELOPMENT, INCLUDING ADA.**

Our experience includes working for federal, state, county and city governments, as well as, working with quasi-governmental agencies. When we work with them, all local, state and federal codes must be adhered to, including but not limited to, the Americans with Disabilities Act and Florida's Potty Parity Statute.

## **F. PREVIOUS, SUCCESSFUL PROJECTS OF A SIMILAR SCOPE, SIZE, COST AND PHASING WITH STRICTLY IMPLEMENTED URBAN DESIGN OR ARCHITECTURAL STANDARDS AND GUIDELINES.**

### **Project: Master Planned Casino and Resort**

**Location:** Indiana

**Description:** Feasibility study and business plan for a casino and master-planned community containing a 468 slip marina (new breakwater for public and private separation) and resort to be constructed over a period of ten years on approximately 350 acres along the shoreline of Lake Michigan.

**Completed:** Ongoing due to Phasing

**Budget:** In excess of \$1 billion

**Client:** First American Equities

**Contact:** Robert Wiesen

**Phone:** 773-248-2232

**Email:** rwiesen@rcn.com

### **Project: Cityfront Center**

**Location:** Chicago, IL

**Description:** 40-acre planned urban development and master plan. The development incorporates 20 Million SF of residential, office, hotel, and commercial space, as well as several major public areas including the River Esplanade, the Ogden Slip Promenade, Ogden Park and the Centennial Fountain, a new municipal landmark at the riverfront. The master plan addressed the open space, with particular sensitivity to historic connections the site offers to the Chicago River, Ogden Slip and Lake Michigan.

**Completed:** 1993

**Budget:** \$604 million

**Client:** Chicago Dock-Canal Trust

**Contact:** Charlie Gardner (former President)

**Phone:** (312) 467-1870

### **Project: Chicago Riverwalk**

**Location:** Chicago, IL

**Description:** Feasibility study for the development of the Chicago Riverwalk, a continuous promenade along the South Bank of the Chicago River from Lake Shore Drive to Lake Street that will provide an active link between the Chicago Loop, the lakefront, and Navy Pier.

**Completed:** 2009

**Budget:** \$73 million

**Client:** Skidmore, Owings & Merrill LLP

**Contact:** Richard Wilson

**Phone:** (312) 554-9090



# *Staff/Team Qualifications and Experience*

## **G. DEMONSTRATED EXPERIENCE WITH CONTRACT NEGOTIATIONS AND ADMINISTRATION**

OS currently provides all contract negotiation and administration services for Central DuPage Hospital for all projects with a construction value of \$2M or greater. We have been providing these services for clients for the past 17 years.

## **H. DEMONSTRATED KNOWLEDGE AND EXPERIENCE REGARDING JOBSITE SAFETY FOR SIMILAR PROJECTS**

Consideration for the safety of individuals performing contracted work and users will begin during the conceptual stage. OS pre-construction project manager, A/E, OS construction manager, and a representative of owner's staff will begin establishing safety requirements early on during conceptual phase and conduct constructability reviews of design from contractors and users perspectives.

### **Contractor Screening**

OS believes that the contractor screening or selection of contractors based on their past safety performance improves the probability that the chosen contractors will have a good safety record on the job for which they are selected. Past experience is, with few exceptions, an indicator of future performance. Three measures of contractor performance, which we use, are:

- Experience Modification Rating (EMR)
- OSHA Indexes
- On-site Audits of Contractor

## **I. DEMONSTRATED EXPERIENCE IN URBAN ENVIRONMENTS REQUIRING CLOSE INTERACTION AMONG AFFECTED PARTIES, STAGING OF ACTIVITIES AND COSTS OCCURRING AS THE RESULT OF HEIGHTENED COORDINATION EFFORTS.**

OS has managed numerous projects in urban environments that required close interaction among various parties. One of our more recent experiences is the coordination we are handling at a casino. The site is adjacent to several old steel foundries, as well as railroad tracks, which split the middle of the site. We are in the process of analyzing the cost and starting the negotiation efforts to move the railroad tracks. One other predominant issue associated with a site of this type is the environmental clean-up and demolition of existing facilities. To date we have successfully removed and abated three of the facilities.

## **J. EXPERIENCE ACTING ON BEHALF OF NON-PROFITS, GOVERNMENT OR INSTITUTIONAL CLIENTS WITH LIMITED STAFF CAPACITY TO COORDINATE AND INTERPRET THE TECHNICAL DEMANDS OF COMPLEX CONSTRUCTION ACTIVITY.**

We have a great deal of experience working with non-profit government and institutional clients who are limited in their staff capacity. OS was hired to establish the project definition, the project implementation, and then project close-out. A few of our representative clients and their projects are:

- **Village of Downers Grove Fire Station** - 32,958 SF 2-story complex incorporating a new fire station that will house four apparatus bays and living quarters for 12-13 firefighters. Project includes an attached 2-story Administration Building for training, fire prevention, and administrative offices.



# *Staff/Team Qualifications and Experience*

- **B'nai Jehoshua Beth Elohim Synagogue** – 72,000 SF new complex that will consist of a chapel, sanctuary, library, social hall, and youth lounge. The complex will also include a Religious Day School with 19 classrooms and 4 pre-K classrooms that will accommodate up to 475 students. Project involves demolition and renovation of three existing office buildings on the Deerfield Business Center site to convert the areas into religious space.
- **Illinois Holocaust Museum** - 65,000 SF new 3-story state-of-the-art facility. Features include a 260-seat lecture hall, classrooms, library, technology center, and ample space for traveling exhibitions. When complete, the building will achieve LEED Silver certification for energy efficiency and use of green materials.

## **K. DEMONSTRATED CAPABILITY AND EXPERIENCE IN EFFECTING COST SAVINGS, VALUE ENGINEERING, CONTAINING COSTS, ENSURING ON-TIME AND QUALITY CONSTRUCTION, AND OTHER WISE FULFILLING OWNERS PROJECT OBJECTIVES THROUGH IMPLEMENTATION OF ITS CORE RESPONSIBILITIES.**

A recent effort that best describes this work would be a project for one of our healthcare clients. Our client was moving forward with the construction of a 300 space parking garage when they employed our services. We quickly analyzed that the current location would require demolition 12 months later; this was due to the location of a 210 bed tower; the footprint was located one third of the way into the new parking garage. We were able to stop this entire process months before the contractor was to break ground, relocate it so that it still met the overall campus master plan intent, and cost the owner no additional time or money.



# Scott Johnston

## Project Executive

As the Project Executive, Mr. Johnston will oversee all operations of the program review. His responsibilities will include working closely with the firm's operation teams to outline work plans, assign duties, and coordinate all details of project assignments. Mr. Johnston has experience in detailed program set-up, CPM scheduling, budget estimating and cost control during the pre-design, design, pre-construction and implementation phases of projects.

Mr. Johnston has experience developing detailed master planned communities and is also able to develop accurate conceptual schedule models. He has knowledge of various construction methods, systems, and materials and keeps track of current material lead times and labor productivity models. Mr. Johnston maintains relationships with various subcontractors and material vendors and has the ability to reconcile logic and schedule opportunities with the design team and other consultants to generate sound documentation for critical path items and maintain a well organized approach and disciplined work ethic.

With a background in project management and master planned communities, Mr. Johnston has been involved in projects of all types and sizes from inception through completion. He has extensive industry knowledge and has experience in the areas of CPM project scheduling, construction management, owner representation, risk management, constructability reviews, construction inspection, change order analysis, and claims evaluation. Mr. Johnston has managed projects for both the private sector and government agencies at the federal, state and local levels. These projects are in excess of \$880 million dollars and total nearly 8.2 million square feet of construction oversight.

### Experience

Firm Experience: 2 years

Industry Experience: 14 years

### Education

Bachelor of Architecture

Auburn University - Auburn, AL

### Project Experience

#### The Harbor – Panama City Beach, FL

The project consisted of a conversion of an existing marina used for commercial charter, dinner cruise and party fishing vessels into a new state of the art destination resort. The new facilities included 40 +/- existing fully serviceable slips and an additional 6 transient slips. The amenities consisted of 80,000 SF of commercial/retail space situated along the waterfront, with 322 condominium units interwoven amongst the community. Creating a fully walk able waterfront resort centered around an existing marina.

#### NC Aquarium – Roanoke Island, NC

Twice its original size, the North Carolina Aquarium on Roanoke Island is a 68,000-square foot educational facility that features the largest aquarium in the state, a 285,000-gallon ocean tank complete with sharks, sea turtles and hundreds of fish. A replica of the USS Monitor anchors the exhibit and scuba divers give daily educational programs.

#### Master Planned Casino and Resort - , IN

Feasibility study and business plan for a casino and master-planned community containing a 468 slip marina (new breakwater for public and private separation) and resort to be constructed over a period of ten years on approximately 350 acres along the shoreline of Lake Michigan.

#### Doubletree Hotel Westshore - Tampa, FL

The project consisted of a total renovation and upgrade for an existing 20-story hotel with 489 executive rooms. The areas involved renovation of guest rooms, conference center, and restaurant. With key coordination requirements to facilitate opening in time for the 2009 Super Bowl being held in Tampa, FL.

#### Magnolia Bay Resort - Panama City Beach, FL

Project consisted of a 20 acre site development for 198 condominiums and 64 residential homes. Project difficulties included the infrastructure needs, which resulted in 3.2 miles of utility upgrades. Also due to its location, coordination with the water, sewer and fire departments were paramount in providing the appropriate resources to the citizens of this development.



# *Kenneth D. Hester, AIA*

## *Project Manager*

Mr. Hester is a project manager with Owner Services Group, Inc. (OS). He is responsible for planning, directing and coordinating activities for a project to ensure the goals and objectives accomplished on time and within established budgets.

Mr. Hester has experience on a wide variety of new and renovation projects including multi-family residential, retail, religious, historical preservation, master planning, and state parks and trail projects.

Mr. Hester has worked as a project manager for developers as well as for architects. He is also a licensed architect. Mr. Hester has extensive experience in project management and quality control issues. He is accustomed to administrative duties necessitating accurate and concise paperwork.

With over 38 years of experience in the construction industry with developers and architects, Mr. Hester has the corresponding knowledge necessary to monitor and inspect projects on behalf of clients.

Prior to joining OS, Mr. Hester's duties included project startups, on site management, closeouts, contract negotiations, conflict resolution, auditing, scheduling, quality and budget control.

### **Experience**

Firm Experience: 1 year  
Industry Experience: 38 years

### **Education**

Bachelor of Architecture

### **Training/Certification**

Registered Architect – State of Alabama

National Council of Architectural Boards (NCARB)  
Certification

Member of AIA

### **Project Experience**

#### **Beach Colony Resorts on Navarre East Building (Phase One) Luxury Condominiums Santa Rosa County, Florida**

The project consisted of the development and construction associated with a luxury 75 unit condominium spread over 175,916 square feet with amenities of pools, spas, weight rooms, etc.

#### **Beach Colony Resorts on Navarre West Building (Phase Two) Luxury Condominiums Santa Rosa County, Florida**

The project consisted of the development and construction associated with a luxury 113 unit condominium spread over 274,136 square feet with amenities of pools, spas, weight rooms, etc.

#### **Beach Colony Resorts Perdido East Building (Phase Three) Luxury Condominiums Escambia County, Florida**

The project consisted of the development and construction associated with a luxury 68 unit condominium spread over 175,916 square feet with amenities of pools, spas, weight rooms, etc.



# DONALD P. JEHLER, P.E.

President



## PROFESSIONAL REGISTRATION

Professional Engineer - Alabama, Florida, Mississippi, North Carolina

## EXPERIENCE

### MANAGERIAL

- President and Owner of consulting engineering firm. Mr. Jehle will be fully responsible and will have full authority for all civil engineering project activities.

### PROJECT ADMINISTRATION

- Promotion and sale of engineering and surveying services.
- Budget control including cost control, billing and collection, and cost manpower estimating.
- Client coordination and coordination with other involved parties including review agencies, public utility systems, contractors and private individuals.
- Project development through the preparation of proposals and statements and qualifications and through interviews with potential clients and selection boards.

### PROJECT PLANNING AND DESIGN

- Design and construction supervision for fuel facility upgrades including new tanks and removal of existing tanks (4 sites).
- Designed grading, paving, and drainage improvements for over 30 church related projects
- Assisted in hydrologic designs for a railroad relocation and bridge project.
- Prepared environmental impact statements for highway projects.
- Supervised and assisted in the surveying of over 150 miles of route surveys for public improvements.
- Prepared layout for industrial, commercial, and residential subdivisions.
- Prepared Master Plans for water systems which included planned program for supply, storage, and distribution improvements.
- Designed projects involving water supply wells, elevated storage tanks, and distribution lines.
- Designed numerous small water and sewer projects including treatment facilities.
- Designed various street improvement projects including drainage provisions.
- Designed grading, paving, and drainage improvements for land development projects.
- Designed numerous projects under open end Department of Defense contracts.

## EDUCATION

AUBURN UNIVERSITY

*M.S. Environmental Engineering, 1974*

AUBURN UNIVERSITY

*B.S. Civil Engineering, 1973*

## PROFESSIONAL AFFILIATIONS

Florida Water and Pollution Control Association  
Water Environment Federation  
American Water Works Association  
Florida Rural Water Association

# Steven Losie, LEED AP

## Senior Project and Cost Manager

Mr. Losie is a Senior Project and Cost Manager with Construction Cost Systems, Inc. (CCS) He is well versed in all aspects of planning, design and construction and has particular expertise in the municipal and public works markets. His responsibilities include on-site project management, construction administration, and management of project budgets.

As a cost manager, Mr. Losie has provided detailed cost estimated at all phases of design, including conceptual, schematic, design development, working drawing and construction document. Mr. Losie's responsibilities have also included quantity take-offs, and obtaining unit and labor/material pricing.

With over 22 years of industry experience, Mr. Losie has experience leading teams through program development and design with a strong emphasis on conceptual and competitive estimating for all facets of delivery methods. His skills include pre-construction project development, construction phase administration, project controls, and on-site project supervision.

As a LEED Accredited Professional, Mr. Losie has a commitment to sustainable design and has been instrumental in the planning of several LEED certified buildings.

### Experience

Company Experience: 1 year  
Industry Experience: 22 years

### Education

Cal State University, Fullerton, California - MBA,  
Finance/Real Estate  
University of Missouri, Rolla, MO - B.S. Geological  
Engineering

### Certification/Associations

LEED AP 2006  
USGBC Local Chapter in Orlando, Florida

### Project Experience

#### East River High School - Orlando, FL

(previously known as Timber Creek High School)  
365,000 SF replacement high school on the east side of Orlando. The facility is comprised of ten buildings and athletic fields on an 80 acre site to support a student population of 2,500.

#### Greater Orlando Airport Authority Airside 1 Orlando, FL

Airside 1 was renovated to complete repair of hurricane damage and update the 20 year old concourse. Work included interior renovations and modernizations from the tram station throughout the Airside.

#### Seminole Hard Rock Hotel Casino Expansion Tampa, FL

This 144,000 SF project comprised a 116,600 SF two story addition to the casino of the Hard Rock Hotel and renovation of 27,400 SF of the existing facility. This site was underlain with numerous utilities servicing the property and public utilities.

#### Aventura Mall Expansion and New Parking Garage Aventura, FL

The project included a three story 235,000 SF expansion of the Mall concourse and 630,000 SF four level parking structure with three connecting bridges. Substantial completion was achieved in 13 months with final completion following in 3 months.

### LEED Project Experience

#### University of Florida – Gainesville, FL

316,669 SF design/build parking garage and administrative offices for campus traffic services. 948 car capacity Project will be completed late spring 2009. It is credited with being one of the first LEED accredited parking garages in the US.

#### Getty Center - Brentwood, CA

Project is comprised of Museum, Research Institute, Rare Books Library, Trust Offices, Auditorium, Food Services Center, two subterranean parking structures, eight miles of roads and an aerial tram on a 120 acre site. Approximately 1,400,000 SF of buildings.



# **Scheduling, Budgeting, Communication**

**Tab 2**

# Scheduling, Budgeting, Communications

## A. CURRENT WORKLOAD AND COMMITMENT OF KEY PROJECT STAFF TO PROJECT

OS' current workload is at 60%, which will allow for this assignment to be completed utilizing existing resources. If necessary, OS has additional project manager that would be available to supplement the proposed project team.

| Name of Project                        | Location of Project | Date for End of Commitment |
|--|---------------------|----------------------------|
| Town of Normal – New Convention Center | Illinois            | 08/2009                    |
| Central DuPage Hospital – IMRIS        | Illinois            | 08/2009                    |
| B'nai Jehoshua Beth Elohim Synagogue   | Illinois            | 11/2009                    |
| Cantera Cancer Treatment Center        | Illinois            | 09/2010                    |
| The Hinsdale Club                      | Illinois            | 09/2010                    |
| Fountaindale Public Library District   | Illinois            | 12/2010                    |
| Central DuPage Hospital – Bed Pavilion | Illinois            | 09/2011                    |
| Gage Building                          | Illinois            | 02/2010                    |
| Doubletree Hotel Westshore - Hostmark  | Florida             | 06/2009                    |
| GSA Project Management IDIQ            | Illinois            | 05/2010                    |

## B. ABILITY TO BE AVAILABLE AND EFFECTIVELY REPRESENT CMPA AT ALL TIMES

We will provide on location staff to provide services to CMPA at all times. In addition, our regional office in Altamonte Springs, Florida can provide additional staff as needed for the project.

## C. DEMONSTRATED ABILITY TO MEET PROJECT SCHEDULES

### Schedule

Scheduling interfaces with cost control, constructability, and program management issues to create a total project control package that increases the likelihood of a project being completed on time and on budget. We develop schedules utilizing input from all participating team members. This joint involvement promotes "buy-in" from all team members and ensures commitment to the schedule.

One of the main benefits of scheduling is that it enables the owner and all project team members to predict and monitor the progress of work. A schedule forms the basis for the overall goal of the project in a graphic timeline format and since it represents real time changes as they occur, corrective actions can be made with ease. Working with the design team and the owner we develop a realistic schedule that identifies all activities relative to design, and major construction components. Our schedules also address key milestones, the approval process for long lead items, shop drawings, and other logistic constraints.

The principles behind our scheduling processes are as follows:

- To provide management systems necessary for the efficient planning and construction of significant new and renovated facilities.
- To maintain an open conduit for information exchange between all project parties.
- To provide information necessary to coordinate the efforts of all project parties through effective communication of project goals and targets.
- To consistently provide current information regarding the contract time and financial status to facilitate decision making (change orders, etc).



# *Scheduling, Budgeting, Communications*

- To identify potential problems before they occur for preventative action.
- To establish specific responsibility for project tasks and to monitor the completion of those tasks relative to overall project completion.

One recent example demonstrating our ability to meet projects schedules was a fire station project we did for The Village of Downers Grove. The site contractor on this project filed for bankruptcy during the project and we managed the project through this delay and brought the project on time and under budget.

Please see a letter of recommendation from the Village of Downers Grove in the Required Forms section (Tab 5) of this proposal.

## **D. DEMONSTRATED ABILITY TO EVALUATE PRODUCTIVITY OF PROJECT CONSTRUCTION AND SERVICE PROVIDERS**

On a recent joint development agreement between a municipality and private developer, we were employed to represent the municipality through the construction of a convention center and parking garage. During construction two issues arose during some of our inspections; one was the high metal stud walls surrounding the convention center were installed and did not appear to conform to the Masonry Institute Standards for attachment of masonry. The second was the concrete installation on the parking deck was completed during cold weather conditions with ACI provisions not being taken into account. Both areas were caught quickly enough so that the remedial action taken did not affect the owner's expected quality or add time to the overall project schedule.

## **E. DEMONSTRATED ABILITY TO COORDINATE PROJECTS OF SIMILAR SIZE, SCOPE AND COST**

OS has quite a bit of experience with projects of similar size, scope and cost. We have included two letters of recommendation that we feel attest to our abilities to lead owners and team members successfully through the various stages of development. We believe that the systems and processes outlined in this proposal illustrate how your waterfront development should be managed and constructed.

## **F. DEMONSTRATED SKILL IN MEETING BUDGETARY REQUIREMENTS**

### **Cost Control**

#### **General**

Construction Cost Systems, Inc. (CCS) will provide cost management support to our owners representative team. The approach outlined below requires a team of estimating specialists and cost managers. These processes have proven successful on numerous projects over the years.

#### **Cost Control**

CCS has established standard methods of operation that include formalized production processes and procedures, documentation and communication. We follow this philosophy when gathering information such as project scope, material price quotations, labor rates and productivity factors. To assure a proper audit trail, we have developed a variety of forms to aid in the process of information gathering, documentation and quality control.



# *Scheduling, Budgeting, Communications*

## **G. DEMONSTRATED ABILITY TO ENSURE QUALITY REQUIREMENTS THROUGHOUT PROJECT**

### **Quality Control Plan – For Owners Representative Service Delivery**

#### **General**

The following outlines our internal Quality Control tasks that we have used for all of the representative projects listed in this proposal.

#### **Project Initiation**

- Receipt of Contract
- Identify scope and tasks required to complete
- Meet with the CMPA to develop written scope, tasks, deliverables and performance criteria. With sign off by the CMPA and OS/CCS Project Executive (PE).
- OS/CCS PE meets with all OS/CCS staff. PE assigns tasks to appropriate OS/CCS staff and develops project schedule for identified task completion. OS/CCS staff and PE sign off on agreed plan.
- Work commences

#### **Inspection Methods – Project Management Services**

Inspection procedures fall into the following categories:

- Routine scheduled on site meetings OS/CCS PE/Staff to review status of task completion.
- Review of administrative reports by OS/CCS PE.
- Random unplanned on site inspection by OS/CCS PE with OS/CCS staff.
- Inspection of deliverables for compliance with contractual task order requests by OS/CCS PE.
- Overview of team performance OS Principal/Client/Staff
- Project close out report. OS/CCS PE and the CMPA meet to review satisfactory performance.
- Process audit and improvement OS/CCS PE/the CMPA review project performance identify opportunities for process improvement and implement necessary procedural changes.

### **Quality Control Plan - Roles And Responsibilities Of Key Personnel**

#### **Roles and Responsibilities of Key Personnel – Owner Representation Services**

Roles and responsibilities will be developed to respond to specific tasks under requirement.

- **Project Executive** - Has overall responsibility to implement company strategies and standards on projects. Inspects and maintains project administration to confirm compliance of standards is maintained.
- **Project Manager** - Will be resident on-site (as required) to administrate the project and complete client goals. Day to day responsibility for overview of contractors performance.

## **H. DEMONSTRATED VERBAL AND WRITTEN REPORTING SKILLS, INCLUDING REPRESENTING CMPA WITH VARIOUS MEDIA**

### **Communications Management**

As the owners representative it is important that we be in position to communicate clearly on all project issues and track all project information. We feel however that effective communication from the owner's perspective needs to focus clearly on project goals and any issues that threaten those goals to that end communication should address the following:



# *Scheduling, Budgeting, Communications*

## **Project Objectives**

- Statement of project goals - by owner
- Changes to project goals - by owner
- Identification of threats and potential impact to project goals
- Resolution of threats to project goals with action by dates and responsibilities
- Confirmation of resolution

Paul James has experience with more than 1,000 live broadcast interviews and many more print interviews. He is located in the Florida Regional Office in Altamonte Springs, Florida and is available to CMPA for media activities. He will provide media training to all OS staff.



# **Project Approach**

## **Tab 3**

# Project Approach

## SUMMARY

The planning, design and construction of a new waterfront development is a highly visible undertaking that generates excitement, interest and sometimes controversy in the community. This process may seem like an adventure and those who have experienced the frustration of development will attest that the excitement can quickly give way to the disappointment of unmet expectations. To ensure a successful outcome, the process must be properly managed.

Project goals must first be properly established. Successful management of the project entails ensuring compliance from the Design (Architect) and Construction (Contractor) delivery team. The owner may also have to manage other entities that have contractual input to the project and can affect the outcome. Such entities may include financial consultants, legal representatives, etc. The owner's organization itself must be managed to ensure that "wish lists" do not lead to unauthorized "scope creep". Finally an astute owner will recognize that many groups, with whom the owner may have no contractual relationship, can affect project success and also need to be managed. Such groups may include community interests, adjoining owners, regulatory authorities, utility companies, etc.

The management effort begins at the earliest phases of the project. Inadequate investment at this phase often leads to unclear expectations and costly changes later in the project. Our first task will be to review your program and documentation relative to scope, quality, cost and schedule that has been prepared to date. Our role will be twofold, firstly to understand your goals and secondly to ensure that they are properly defined. Of all the goals it is cost, risk and schedule, which most often cause problems at later stages of design and construction. The balancing of all the goals is effectively a value decision and therefore ultimately a question of fiscal resources. It must be recognized that the main focus of any project is the owner and the owner's core business. Technical members of the project definition team must therefore accept that value decisions rest squarely with the owner.

The following describes our approach to each phase of your project; however a list of specific services that we will provide is included in our Implementation Plan.

As your owners representative we will be focused on your goals and objectives ensuring that they are met. We also lead your team, answer your questions and facilitate communications throughout the project. We ensure that your project is successful by guiding and making sure that ***the right things are done at the right time, in the right order and by the right people.***

Studies show that up to 80% of a project's success rate is dependent upon the decisions made during the planning phase. By defining your project scope, determining quality and risk expectations, preparing construction costs and developing a feasible schedule, we will determine the project objectives or goals for your project that will be monitored throughout the project.

## STRATOS MANAGEMENT

Since 1992, OS has mapped the design and construction process from owner concept through warranty review. We have charted every step of the process identifying all the tasks associated with each step. We have developed questionnaires and check lists to ensure that every aspect of the project is reviewed, approved and documented.

With the inception of The Stratos Initiative™, our proprietary web-based project management system, we can provide our clients with an instant dashboard view of their project's schedule and budget. The Stratos Initiative™ allows OS to out-perform traditional project management and owner representative services.

The foundation of this system is based on the following principals:

- Emphasis on Project Definition and Requirements
- Establishment of Clear Requirements
- Informed Decision Making



# Project Approach

- Risk Identification and Management
- Objectivity

The foundation principals provide for on-going interaction with our clients and the on-schedule, on-budget and successful completion of their projects.

The Stratos Initiative™ is a communication and tracking tool. Through the implementation of Stratos, OS is able to provide timely issues-based communication. Stratos allows us to capture and prioritize all project related communications for accurate record keeping. Every step of the process is documented and auditable. Every milestone is identified and linked to the schedule. Through this process, nothing is overlooked. Our project managers can provide our clients with instant information on each step of the project.

## **COMMUNICATIONS MANAGEMENT**

As the owners representative, it is important that we be in position to communicate clearly on all project issues and track all project information. We feel however that effective communication from the Owner's perspective needs to focus clearly on project goals and any issues that threaten those goals to that end communication should address the following:

### **Project Objectives**

- Statement of project goals - by owner
- Changes to project goals - by owner
- Identification of threats and potential impact to project goals
- Resolution of threats to project goals with action by dates and responsibilities
- Confirmation of resolution

### **Fiscal Controls**

- Budget statement and contracts
- Notice of change orders, claim, etc.
- Review / authorization of same
- Budget status monitoring
- Invoice processing, pay requests and waivers
- Instructions in writing

### **Schedule Compliance**

- Schedule established
- Detailed schedule review and agreement
- Schedule monitoring and update
- Schedule slippage
- Corrective measures - work around
- Two week look ahead

### **Quality Controls**

- Bid documents
- Shop drawing, as built
- Change order requests, approval

- Testing / inspection
- Inspection reports
- Non-compliance reports
- Corrective measures – identify, impact, work around

### **Other Internal Project Participants**

- Two-way communication must be clear with all other internal participants with whom the CMPA has some contracted relationship to ensure that the core design construct team is coordinated with all such participants.
- Administration
- User groups, university program representative
- The CMPA - community affairs
- The CMPA - compliance
- The CMPA - separate contractors
- Utilities

### **Other External Project Participants**

- Communication must be clear and properly controlled with all other potential external project participants who may influence the project but have no contracted relationship with the CMPA.
- Regulatory Agencies
- Utilities
- Community Groups



# Project Approach

## **Communication Systems**

OS' project record keeping process tracks at all levels identified above and incorporate all construction administration categories (i.e. jobsite meetings, RFI's, change orders logs, etc.). Our specialized filing format expands on this list and will be made available, if required. OS' project managers are all equipped with laptop computers and cellular phones.

## **Open and Constructive Procedures**

Communication is a key factor in project and team success. Written records are kept to monitor all project activities thus forming the project history and audit trail, should they be necessary.

## **Key Components of Communication**

The major forums for communication throughout the project are:

- Owner's regular team meetings
- Regular OAC project meetings
- Weekly jobsite meetings
- Daily status meetings
- Critical issue resolution meeting, as needed
- Meetings with other project participants, as needed / scheduled
- Project-wide communication will be via electronic media, telephone and written communication, as necessary
- Web-based project management system may facilitate communication

## **COST CONTROL**

Construction Cost Systems, Inc. (CCS) will provide cost management support to our project management team. The approach outlined below requires a team of estimating specialists and cost managers.

CCS has established standard methods of operation that include formalized production processes and procedures, documentation and communication. We follow this philosophy when gathering information such as project scope, material price quotations, labor rates and productivity factors. To assure a proper audit trail, we have developed a variety of forms to aid in the process of information gathering, documentation and quality control.

Estimates are prepared using computer systems that are flexible in terms of presentation and format. We have standardized our approach to the planning, organizing and management of cost estimating projects. Our process begins by discussing the project scope with the design team to define and understand key parameters and goals, as well as determine project-staffing needs.

Utilizing CCS' Project Briefing checklist, a more in-depth project briefing is conducted with the design team, where each building system is discussed and documented. Our technical staff prepares detailed quantity take-offs organized by major building systems such as foundations, slab-on-grade, exterior walls, roofing, and structural systems. Factors such as high cost, large quantities, and special items requiring quotations from contractors and suppliers are identified.

Quantities for all disciplines (architectural, structural, mechanical, electrical and civil) are documented utilizing computerized digitizers and standard quantity measurement tools. These quantities are documented electronically on project take-off sheets and include dimensions, location notes, notes to estimator, and additional detailed backup. Quantities are summarized and transferred into final estimate formats by specific building systems or trades.

After quantity take-offs are completed and checked, a separate price reflecting the labor and material components for each line item in the estimate is developed based on specific project location.



# *Project Approach*

CCS obtains and documents price quotations from contractors, sub-contractors and suppliers who have previous experience with similar projects, as well as from various published trade publications.

CCS' philosophy on pricing is to obtain actual market information and then temper it with our experience and various reference materials. Our cost managers also review issues such as constructability, site access, contractual constraints, and phasing to produce an estimate that is as "real world" as possible.

To assure that no major errors have gone undetected, bulk quantities are compared against quantities in the estimates, and these values are then documented on Bulk Check Forms. A principal or senior project manager conducts peer reviews, verifying prices and documenting other comments on Peer Review Forms. CCS also utilizes project control quantities to review the ratio of various building systems to the project area. These control quantities help focus the team on reasons for cost differences and identify areas that have the most potential for value engineering.

To further ensure that all parties have a clear understanding of a project as it progresses, all telephone conversations regarding the project are documented to maintain a record of what was discussed. All team members agree upon any comments and/or changes before they are incorporated into the final report.

Once the process described above is complete, the estimate is then submitted to the client, who then has the opportunity to make comments that can be incorporated into the next submittal. CCS diligently follows this process for all estimates at all stages of design completion (conceptual, schematic, design development, working drawing, contract documents, post contracts).

Deliverables are established in contract negotiations prior to notice-to-proceed, and services are performed in accordance with all applicable state, federal, and local laws, rules and regulations. Estimates can be produced in parameter cost model, conceptual, schematic, design development and construction document stages of design, and can be prepared in standard Unifomat, CSI or customized formats to meet specific project needs. Depending on what our clients prefer, we can deliver our estimates in hard copy format and/or electronically in Microsoft Excel format.

## SCHEDULE

Scheduling interfaces with cost control, constructability, and program management issues to create a total project control package that increases the likelihood of a project being completed on time and on budget. We develop schedules utilizing input from all participating team members. This joint involvement promotes "buy-in" from all team members and ensures commitment to the schedule.

One of the main benefits of scheduling is that it enables the owner and all project team members to predict and monitor the progress of work. A schedule forms the basis for the overall goal of the project in a graphic timeline format and since it represents real time changes as they occur, corrective actions can be made with ease. Working with the design team and the owner we develop a realistic schedule that identifies all activities relative to design, and major construction components. Our schedules also address key milestones, the approval process for long lead items, shop drawings, and other logistic constraints.

The principles behind our scheduling processes are as follows:

- To provide management systems necessary for the efficient planning and construction of significant new and renovated facilities.
- To maintain an open conduit for information exchange between all project parties.
- To provide information necessary to coordinate the efforts of all project parties through effective communication of project goals and targets.



# *Project Approach*

- To consistently provide current information regarding the contract time and financial status to facilitate decision making (change orders, etc).
- To identify potential problems before they occur for preventative action.
- To establish specific responsibility for project tasks and to monitor the completion of those tasks relative to overall project completion.

For the scheduling aspect of a project, OS is quite versed in the use and application of Primavera and Microsoft Project scheduling software. Coupled with our prior field experience and construction knowledge, we are able to develop real time schedules that are accurate and concise.

We follow the steps outlined below when developing schedules:

- Identify major tasks and anticipated durations
- Identify long lead items
- Schedule owner supplied equipment
- Prepare preliminary logic
- Identify critical tasks
- Prepare preliminary bar chart schedules
- Prepare initial milestone schedule
- Issue preliminary project schedule for review
- Negotiate and issue final project schedule
- Monitor progress schedule team updates

Based on this information, OS will develop a milestone / turnaround schedule with appropriate phases that will identify logic, durations, and owner milestones. This schedule will be the basis for cost related items such as general conditions duration, tie-ins and temporary systems, entrances, circulation, labor productivity, out of hours work, and escalation. This schedule specifies the proposed start and finish dates by which certain activities must be complete. After the owner accepts the master schedule, we prepare the milestone schedule for the design phase. This is a method for judging progress during the design phase.

Our phased construction experience helps us understand the bid packages as they are written and provide a real time schedule and cost estimate as to how the work should transpire. When addressing phased construction projects, these are the steps OS follows:

- Walk project site, get background on the project logistics, etc
- Review anticipated scope of work and extent of renovation work (i.e. what will the impact be in Architectural, Structural, Mechanical, Electrical)
- Schedule a working session with all team members to develop approach and outline issues from the perspective of all parties involved, including operations, temporary space availability, project logistics, etc.

With this schedule in place the ability to influence project cost diminishes rapidly throughout the life of the project. Project controls; which includes planning, scheduling, document and cost control, offers the ability to provide a detailed analysis of the project. Software packages such as Microsoft Project and Primavera P3, with collaboration through Microsoft Back Offices (Exchange, Outlook, IIS, Excel, Word, Access and Project Central) and cost control through CGC/Project Administrator, enables us to provide our managers with current data that is vital to cost and schedule control. Also, we are able to develop "what if" scenarios to determine the most productive direction in which to proceed.



# Project Approach

## PROJECT SCHEDULE RECOMMENDATIONS

Prior to transmitting contract documents to bidders we will, if required, prepare a pre-bid construction schedule for the project and make the schedule available to the bidders during the bid and award phase. We provide a copy of the master schedule to the bidders, however, each contractor prepares its own construction schedule in accordance with the requirements of the contract documents, which we review.

A milestone schedule will be developed by OS from prior approved pre-construction schedules for inclusion in the bid packages. This will help to eliminate delays due to a lack of sub-contractor manpower. All subcontractors will know what is expected of them prior to submitting their proposals. Using contractor-supplied data, we assemble and distribute an original baseline schedule for all contractors to review and approve by signature. The schedule shall contain as many activities as necessary to properly describe the work such that the status can be identified of any particular schedule activity clearly and easily.

During construction the schedule is reviewed weekly and updated monthly to coincide with the project pay requests. If schedule slippage occurs, a "recovery" cycle is added to the schedule. This cycle will be monitored constantly, using float-time and recovery activities to ensure that key, milestone dates are met.

Upon approval of the baseline schedule, OS may cost load the itemized schedule. The period pay draw for various subcontractors shall be the percentage of completed work multiplied by the scheduled value of work. OS can prepare the pay application backup material from schedule-derived calculation of Earned Value and publish the material in AIA G702 format. The schedule will be updated no less than twice per month, with the second schedule meeting of the month serving as the cutoff for period progress payments. OS shall update the schedule regularly to reflect the current status of the work including days ahead/behind schedule, definition of the current critical path and other significant paths of work and current or anticipated problem areas. Tabular, graphic and narrative reports shall be issued to illustrate the status of the work.

Special reports shall be issued as necessary to illustrate unique problem areas or to achieve understanding of a complex problem. The reports may include the following:

- Limited-scope sub-schedules to define a detailed work sequence where difficult conditions threaten the overall schedule.
- Actual project cash draws versus planned early/late cash draws, to establish a broader view of the project's ability to finish on time.
- "On-time" comparisons of actual work completion versus planned completion (to establish responsibilities for lateness, etc.) If the updated schedule indicates the project has fallen behind by twenty or more calendar days for reasons controlled by the contractors, a recovery schedule will be issued to obtain compliance by all contractors.

A prudent owner will recognize that many issues associated with construction involve fiscal risk. We will review the extent of that risk and recommend appropriate risk minimization strategies. For instance one of our key areas of focus as an organization is the permitting and compliance of a project and its intended use. OS has had many dealings with the various permitting and compliancy agencies at all levels (i.e. local, state, ACOE).

Examples include:

- **Waterfront clients** - we have dealt, monitored, drafted and managed the permitting and regulatory components required by DENR, USACOE and DEP.
- **Healthcare clients** – we manage, monitor, draft the components associated with permitting and inspections; as well as the state mandated CON process.
- **Private/Commercial clients** – we monitor, draft and manage the permitting process for building and various site work permits (dependent on the size of site and permit required).



# Project Approach

We are also well versed in the wetland delineation process, if required. Lastly, depending on our client's needs or team determination of suggested land use, we can facilitate land use changes, development order requirements and land development regulations.

To OS permitting and compliance is one of the most critical components of the planning and feasibility portions of a project. If not planned or monitored properly this will be end of a project before it really starts.

Collectively, your project scope, total project budget, quality expectations, risk tolerance and schedule form your project goals. These project goals will not only become a means for keeping team members accountable, but it will also help you select team members. Architects have many specialties and it is important to be able to match an architect to your needs. We will assist you in the selection of the architect by developing criteria for selection, preparing and transmitting the Requests For Qualification (RFQ), reviewing written qualifications, conducting interviews, evaluating candidates and making recommendations. We will also conduct an orientation with the selected architect to discuss administrative requirements and procedures.

## DESIGN PARTNERING/TEAMWORK

We believe teamwork is a cornerstone of successful projects and whether teamwork is integrated as a philosophy and formalized in partnering agreement. These are fundamentals that apply.

- Establishment of realistic well-balanced goals. The team must ultimately “buy in” to the belief that the project objectives are achieved.
- Recognition of the common interests of all stakeholders and participants.
- A clear statement of project goals, this may be a written “project mission statement”.
- Initial project meeting to discuss goals, agree on operating procedures, communication procedures, issue resolution guideline. This could be recorded in minutes or formally memorialized in a partnering agreement.
- Regular partnering reviews throughout the project to review project goals, issue resolution effectiveness and team operational issues.
- Commitment and Accountability – no process will be successful without commitment accountability to the project and all other participants.
- Leadership – it is essential that there is a clear leadership so that project motion is maintained.

In summary, teamwork starts with a solid foundation of realistic goals and continues with a commitment to these goals and to the legitimate interests of all participants. Team members agree to work together using agreed procedures to deal predicatively with issues in a manner that honors the commitment made. This entire concept requires leadership to be committed to creating a winning project environment.

Throughout the design phase, we will monitor the architect's compliance with the project objectives and coordinate and expedite the flow of information between you and the architect. On a regular basis, we will conduct meetings that will serve as a forum for the exchange of information concerning the project objectives and the design progress and we will prepare and distribute minutes from these meetings.

As the architect produces design documents, we will review them for clarity, consistency, constructability and compliance with the project objectives. At the end of the schematic, design development and construction document stages, we will provide an estimate of the construction cost based on the drawings submitted. These estimates will be accompanied by a report that will identify variances, if any, from the project objectives. If there are variances, we will work with you and the architect to resolve them and provide value engineering options that will address costs related to efficiency, usable life, maintenance, energy and operation. The result of the value engineering session will be a budget that complies with the project objectives.



# Project Approach

## CONSTRUCTABILITY REVIEW

As owners representatives, our involvement in constructability reviews occur throughout the design process. The architect is responsible for drawing completion and coordination and the contractor ultimately takes responsibility for means and methods. However we bring our experience gained over 5,000 projects to bring on every assignment to challenge and validate design and construction solution. In the course of our engagement working with the design teams there are numerous forums for the following to occur:

### **Project Definition**

- Review System/Material selections
- Raise Logistic/Operational Issues
- Review Building Efficiency
- Compare to Market Standards

### **Design Phase Reviews**

- Review Systems Life Cycle
- Discuss Construction Methods (with A/E and CM)
- Review Total Impact of System Selection

### **Detailed Estimating Process**

- **“Build-it-in-our-minds”** – Throughout the estimating process we are reviewing details/completeness, requesting clarifications, suggesting options. This process inevitably surfaces opportunities to review constructability options. We typically identify major value/enhancement opportunities.
- **Bidding Process** – OS will review the completion and structure of the GMP and subsequent bid packages for completion and coordination.

As design progresses, the design documents will need approval by regulatory agencies. We will oversee the transmittal process and advise you of any potential problems in completion of such reviews, as well as expedite information to keep the project in compliance with the project objectives. We will also continually monitor the master schedule to ensure the construction will not be delayed.

Often times the project objectives will require a specific project delivery method. For example, maybe the project objective has a time constraint and will require the project to be bid out as a fast track. We will review the project objectives and make recommendations to you with respect to the appropriate delivery method, sequence of construction, construction duration and the separation of the project into contracts for various categories of work.

### **Project Purchasing Objectives**

At OS we believe the fundamental goal for project purchasing is to obtain the right products and services for the stated purpose; at the right time, place and cost; in a manner that balances the overall institutional requirements for economy, transparency and accountability and the needs of line management for flexibility and responsiveness to their particular operational circumstances. This activity is accomplished with the highest level of ethical standards for fair and equitable treatment of suppliers providing goods and services to the project and the CMPA.

### **OS Approach to Purchasing**

OS will work closely with CMPA's Purchasing to ensure compliance with CMPA's Project purchasing procedures.

- It allows for application of consistent levels of project purchased within the broader CMPA's purchasing best practices and within the CMPA Policy.
- It makes best use of OS purchasing staff experience within the CMPA structure.
- It ensures internal and external checks and balances are maintained between the project and the CMPA.

### **GMP Solicitation**

OS will work with the CMPA to produce a list of companies to be given the opportunity to respond to a RFQ for GMP services. The RFQ will focus on the CMPA's sensitive issues so that the most suitable companies respond most favorably.



# *Project Approach*

Upon receipt of the written responses to the RFQ, these will be analyzed and rated by the project team utilizing a points rating system. The project team will then analyze these points and form a select number of companies to be interviewed. The interviews will focus heavily on the compatibility of the staff assigned to the project. The proposals will be analyzed for content and scope inclusion before the project team makes a recommendation.

## **Review of Bid Packages**

OS will review bid packages for scope content and coordination of other packages with the project team. Specifically the content will be reviewed for items that may not be fully defined and potentially full between packages. This will be done while working with the Construction Manager with details contained in estimates.

## **OS Purchasing (other items)**

- The OS project staff will support procurement efforts, ensure that all purchasing is carried out in accordance with the CMPA's Policy.
- The OS project staff will work closely with the CMPA and User Departments to ensure that the CMPA receives the best value for money in terms of such factors as price, fitness for purpose, environmental efficiency, maintenance provisions, operating costs, guarantees, delivery and installation, as well as terms and conditions of payment.
- The respective roles and accountabilities of the OS project staff and the CMPA and User Departments in terms of the process.
- A Purchasing Review team shall be appointed. The Purchasing Review team will review purchases, which represent a cost to the project and the CMPA of a certain dollar value or more before commitment or award of a contract.

OS has dealt with all major project delivery methods including traditional bid, construction management, and design build. While the bidding process for each method may vary, there are some underlying fundamentals. Open bidding may be a requirement, however, we often pre-qualify bidders. This pre-qualification process requires an interested bidder to be determined qualified before they can actually bid on the project. An open bid process may not require the bidder to address items such as financial issues, litigation or project experience. We will prepare notices, advertisements and distribute questionnaires, receive and analyze the completed questionnaires, interview possible bidders and prepare recommendations.

Before the bids are due, we will conduct a pre-bid conference to explain the project requirements to the bidders, including information regarding schedule and cost control and any administrative and technical information requirements. We will also coordinate the procedures for answering clarifications to the bid documents. If a clarification results in a change to the contract documents, addenda will be issued by the architect. We will review the addenda for clarity, consistency, constructability and compliance with the project objectives.

When the bids are due, we will assist you in the opening of the bid packages and we will evaluate the bids for contract document compliance and price. We will also assist in the acceptance and rejection of bids and the notification to all bidders.

Before construction begins, we will conduct a pre-construction conference where we will review the project objectives, administrative requirements, and procedures with the contractor. Throughout the project we will monitor the contractor's compliance with the project objectives and coordinate and expedite the flow of information between you and the contractor.

Upon selection, the successful contractor will submit an application, certificates and other documents as evidence that they have secured the required permits, bonds and insurance. We will review these documents to make sure they are in compliance.



# *Project Approach*

The master schedule that we prepare covers the entire project and addresses all project objectives and participants. By contractual obligation, the contractor will provide a construction schedule that will cover only construction. We will review the contractor's schedule to make sure it is prepared in accordance with the requirements of the contract documents and in compliance with the project objectives.

During the construction phase, your project will start to become a reality, however it can also be very stressful. As your team leader, we will establish procedures for expediting and monitoring all construction phase information.

As your on-site representative, we will visit the project site on a pre-agreed basis and provide construction observation as your agent. We will conduct project meetings on a weekly basis to exchange information concerning the project objectives, the project status and overall review of construction. We will prepare and distribute the minutes of these meetings and will track outstanding issues, placing accountability to appropriate team members for resolution of the issue within a certain time frame.

We will also prepare weekly reports which will address the status of all project objectives and key project issues. Your contractor will submit payment applications on a monthly basis. We will review the payment application and make a recommendation to you on whether the amount requested accurately reflects the progress of the contractor's work.

There are often changes in construction, whether it is something that you decide to change, something that happens that was not anticipated, or the contractor requests a change. After the architect has outlined the request for a change in scope, we will review the contents of the request and make a recommendation to you with respect to the acceptance or rejection of the change order and advise you of any cost and schedule impact.

We will monitor the contractor's adherence to the agreed project schedule. In the event of slippage, we will request, review and negotiate a recovery plan to bring the project back on track.

When the contractor's work is substantially complete, the architect will prepare a list of incomplete work, or a punch list. This list will be attached to the Certificate of Substantial Completion and we will monitor the completion of all incomplete work prior to the issuance of the Certificate. Once all of the work is complete, the architect will issue a Certificate of Final Completion and provide a written recommendation regarding payment to the contractor. We will review this recommendation and the final work and advise you with respect to the acceptance or rejection of the final payment.

Throughout the entire process there are many documents that are produced, including the architect's drawings, shop drawings, as-builts, and submittals for changes. The compilation of these documents is known as record documents. We will compile the record documents and transmit them to you. We will also compile the operation and maintenance materials.

At the conclusion of the project, we will accompany governmental officials during the inspection of the facility and assist in obtaining the occupancy permit. We will also prepare a final project accounting report and any necessary closeout reports. These reports will be the final review of the team's adherence to the project objectives. While completing the project is an achievement, it is most successful when completed in adherence to the original project objectives.



# **Local, Small, Minority Participation**

## **Tab 4**

# *Local/Small/Minority Business Participation*

The firms we have chosen to team with are certified local, small and/or minority businesses. Specifically:

## **Jehle-Halstead, Inc. (JHI) - Engineers**

JHI is certified with the City of Pensacola as Small Business Enterprise and they have an office in Pensacola. A copy of their certification letter, as well as additional information on the company can be found in the Required Forms section (Tab 5) of this proposal.

## **Construction Cost Systems, Inc. (CCS) – Cost Managers**

CCS is certified as a Minority company with the Florida Minority Supplier Development Council and they have an office in Altamonte Springs, Florida. Additional information on CCS can be found in the Required Forms section (Tab 5) of this proposal.

## **Additional Staffing**

When additional resources are needed, we are committed to looking local first and supporting the local, small and minority business community.



# **Required Forms**

## **Tab 5**

**52.209-5 FAR Certification Regarding Debarment, Suspension,  
Proposed Debarment, and Other Responsibility Matters**

1. The Offeror certifies, to the best of its knowledge and belief, that the Offeror and/or any of its Principals:

A. Are not presently debarred, suspended, proposed for debarment, or declared ineligible for the award of contracts by any Federal agency.

B. Have not, within a three-year period preceding this offer, been convicted of or had a civil judgment rendered against them for: commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, state, or local) contract or subcontract; violation of Federal or state antitrust statutes relating to the submission of offers; or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, tax evasion, or receiving stolen property; and

C. Are not presently indicted for, or otherwise criminally or civilly charged by a governmental entity with, commission of any of the offenses enumerated in paragraph 1-B of this provision.

2. The Offeror has not, within a three-year period preceding this offer, had one or more contracts terminated for default by any Federal agency.

A. "Principals," for the purposes of this certification, means officers; directors; owners; partners; and, persons having primary management or supervisory responsibilities within a business entity (e.g., general manager; plant manager; head of a subsidiary, division, or business segment, and similar positions). This Certification Concerns a Matter Within the Jurisdiction of an Agency of the United States and the Making of a False, Fictitious, or Fraudulent Certification May Render the Maker Subject to Prosecution Under Section 1001, Title 18, United States Code.

B. The Offeror shall provide immediate written notice to the Contracting Officer if, at any time prior to contract award, the Offeror learns that its certification was erroneous when submitted or has become erroneous by reason of changed circumstances.

C. A certification that any of the items in paragraph (a) of this provision exists will not necessarily result in withholding of an award under this solicitation. However, the certification will be considered in connection with a determination of the Offeror's responsibility. Failure of the Offeror to furnish a certification or provide such additional information as requested by the Contracting Officer may render the Offeror non-responsible.

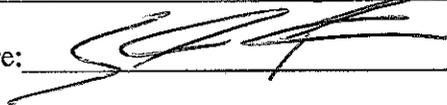
D. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render, in good faith, the certification required by paragraph (a) of this provision. The knowledge and information of an Offeror is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.

E. The certification in paragraph (a) of this provision is a material representation of fact upon which reliance was placed when making award. If it is later determined that the Offeror knowingly rendered an erroneous certification, in addition to other remedies available to the Government, the Contracting Officer may terminate the contract resulting from this solicitation for default.

**52.209-6 FAR Protecting the Government's Interest When Subcontracting with Contractors Debarred, Suspended, or Proposed for Debarment**

1. The Government suspends or debar Contractors to protect the Government's interests. The Contractor shall not enter into any subcontract in excess of \$25,000 with a Contractor that is debarred, suspended, or proposed for debarment unless there is a compelling reason to do so.
2. The Contractor shall require each proposed first-tier subcontractor, whose subcontract will exceed \$25,000, to disclose to the Contractor, in writing, whether as of the time of award of the subcontract, the subcontractor, or its principals, is or is not debarred, suspended, or proposed for debarment by the Federal Government.
3. A corporate officer or a designee of the Contractor shall notify the Contracting Officer, in writing, before entering into a subcontract with a party that is debarred, suspended, or proposed for debarment (see FAR 9.404 for information on the Excluded Parties List System). The notice must include the following:
  - A. The name of the subcontractor.
  - B. The Contractor's knowledge of the reasons for the subcontractor being in the Excluded Parties List System.
  - C. The compelling reason(s) for doing business with the subcontractor notwithstanding its inclusion in the Excluded Parties List System.
  - D. The systems and procedures the Contractor has established to ensure that it is fully protecting the Government's interests when dealing with such subcontractor in view of the specific basis for the party's debarment, suspension, or proposed debarment.

Company Name: Owner Services Group, Inc.

Authorized Signature: 

Printed Name: Scott Johnston, Director of Operations

Date: May 22, 2009

# ACORD CERTIFICATE OF LIABILITY INSURANCE

OP ID JW  
CONST-1

DATE (MM/DD/YYYY)

05/12/08

**PRODUCER**  
M.G. Welbel & Associates, Inc.  
Michael Welbel  
633 Skokie Blvd., Suite 470  
Northbrook IL 60062  
Phone: 847-412-1414 Fax: 847-412-1013

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

**INSURERS AFFORDING COVERAGE**

NAIC #

INSURER A: Lloyds of London

INSURER B:

INSURER C:

INSURER D:

INSURER E:

Owner Services Group, Inc.  
1815 S. Meyers Rd., #200  
Oakbrook Terrace IL 60181

**COVERAGES**

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

| INSR LTR | ADDL INSR | TYPE OF INSURANCE  | POLICY NUMBER | POLICY EFFECTIVE DATE (MM/DD/YY) | POLICY EXPIRATION DATE (MM/DD/YY) | LIMITS                                    |           |
|----------|-----------|--|---------------|----------------------------------|-----------------------------------|---|-----------|
|          |           | <b>GENERAL LIABILITY</b><br><input type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS MADE <input type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC |               |                                  |                                   | EACH OCCURRENCE                           | \$        |
|          |           |  |               |                                  |                                   | DAMAGE TO RENTED PREMISES (Ea occurrence) | \$        |
|          |           |  |               |                                  |                                   | MED EXP (Any one person)                  | \$        |
|          |           |  |               |                                  |                                   | PERSONAL & ADV INJURY                     | \$        |
|          |           |  |               |                                  |                                   | GENERAL AGGREGATE                         | \$        |
|          |           |  |               |                                  |                                   | PRODUCTS - COMP/OP-AGG                    | \$        |
|          |           | <b>AUTOMOBILE LIABILITY</b><br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> ALL OWNED AUTOS<br><input type="checkbox"/> SCHEDULED AUTOS<br><input type="checkbox"/> HIRED AUTOS<br><input type="checkbox"/> NON-OWNED AUTOS   |               |                                  |                                   | COMBINED SINGLE LIMIT (Ea accident)       | \$        |
|          |           |  |               |                                  |                                   | BODILY INJURY (Per person)                | \$        |
|          |           |  |               |                                  |                                   | BODILY INJURY (Per accident)              | \$        |
|          |           |  |               |                                  |                                   | PROPERTY DAMAGE (Per accident)            | \$        |
|          |           | <b>GARAGE LIABILITY</b><br><input type="checkbox"/> ANY AUTO   |               |                                  |                                   | AUTO ONLY - EA ACCIDENT                   | \$        |
|          |           |  |               |                                  |                                   | OTHER THAN EA ACC                         | \$        |
|          |           |  |               |                                  |                                   | AUTO ONLY: AGG                            | \$        |
|          |           | <b>EXCESS/UMBRELLA LIABILITY</b><br><input type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE<br><br><input type="checkbox"/> DEDUCTIBLE<br><input type="checkbox"/> RETENTION \$  |               |                                  |                                   | EACH OCCURRENCE                           | \$        |
|          |           |  |               |                                  |                                   | AGGREGATE                                 | \$        |
|          |           |  |               |                                  |                                   |   | \$        |
|          |           |  |               |                                  |                                   |   | \$        |
|          |           |  |               |                                  |                                   |   | \$        |
|          |           | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED?<br>If yes, describe under SPECIAL PROVISIONS below   |               |                                  |                                   | WC STATUTORY LIMITS                       | OTH-ER    |
|          |           |  |               |                                  |                                   | E.L. EACH ACCIDENT                        | \$        |
|          |           |  |               |                                  |                                   | E.L. DISEASE - EA EMPLOYEE                | \$        |
|          |           |  |               |                                  |                                   | E.L. DISEASE - POLICY LIMIT               | \$        |
| A        |           | <b>OTHER</b><br>Professional Liab  | P005780800    | 05/08/08                         | 05/08/09                          | Per Claim                                 | 2,000,000 |
|          |           |  |               |                                  |                                   | Aggregate                                 | 2,000,000 |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS  
 Evidence of Insurance Only

**CERTIFICATE HOLDER**

OWNER01

Owner Services Group Inc.  
1815 S. Meyers Rd., #200  
Oakbrook Terrace IL 60181

**CANCELLATION**

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO DO SO SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE

*Michael J. Welbel*

# ACORD CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
09/16/2008

PRODUCER (847)679-7350 FAX (847)679-7361  
T.A. Cummings Jr. Company  
4153 Main St.  
Skokie, IL 60076

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW.

| INSURERS AFFORDING COVERAGE                     | NAIC # |
|---|--------|
| INSURER A: North American Capacity Insurance Co |        |
| INSURER B: The Harford Insurance Companies      |        |
| INSURER C: American Guarantee & Liability       |        |
| INSURER D:                                      |        |
| INSURER E:                                      |        |

INSURED Owners Services Group  
1815 S. Meyers Rd. Suite 200  
OakBrook Terrance, IL 60181

## COVERAGES

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

| INSR ADD'L LTR. INSR | TYPE OF INSURANCE  | POLICY NUMBER | POLICY EFFECTIVE DATE (MM/DD/YY) | POLICY EXPIRATION DATE (MM/DD/YY) | LIMITS   |
|----------------------|--|---------------|----------------------------------|-----------------------------------|--|
| A                    | GENERAL LIABILITY<br><input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS MADE <input checked="" type="checkbox"/> OCCUR  | TBD100108     | 10/01/2008                       | 10/01/2009                        | EACH OCCURRENCE \$ 1,000,000   |
|                      | GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC   |               |                                  |                                   | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000                                   |
|                      |  |               |                                  |                                   | MED EXP (Any one person) \$ 5,000  |
|                      |  |               |                                  |                                   | PERSONAL & ADV INJURY \$ 1,000,000   |
|                      |  |               |                                  |                                   | GENERAL AGGREGATE \$ 2,000,000   |
|                      |  |               |                                  |                                   | PRODUCTS - COM/OP AGG \$ 1,000,000   |
| B                    | AUTOMOBILE LIABILITY<br><input type="checkbox"/> ANY AUTO<br><input type="checkbox"/> ALL OWNED AUTOS<br><input checked="" type="checkbox"/> SCHEDULED AUTOS<br><input checked="" type="checkbox"/> HIRED AUTOS<br><input checked="" type="checkbox"/> NON-OWNED AUTOS | 83UECIU5531   | 10/01/2008                       | 10/01/2009                        | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000                                       |
|                      |  |               |                                  |                                   | BODILY INJURY (Per person) \$  |
|                      |  |               |                                  |                                   | BODILY INJURY (Per accident) \$  |
|                      |  |               |                                  |                                   | PROPERTY DAMAGE (Per accident) \$  |
|                      | GARAGE LIABILITY<br><input type="checkbox"/> ANY AUTO  |               |                                  |                                   | AUTO ONLY - EA ACCIDENT \$   |
|                      |  |               |                                  |                                   | OTHER THAN AUTO ONLY: EA ACC \$  |
|                      |  |               |                                  |                                   | AGG \$   |
| C                    | EXCESS/UMBRELLA LIABILITY<br><input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> CLAIMS MADE  | AUC5327456-04 | 10/01/2008                       | 10/01/2009                        | EACH OCCURRENCE \$ 5,000,000   |
|                      |  |               |                                  |                                   | AGGREGATE \$ 5,000,000   |
|                      |  |               |                                  |                                   | \$   |
|                      |  |               |                                  |                                   | \$   |
|                      | DEDUCTIBLE \$  |               |                                  |                                   | \$   |
|                      | RETENTION \$   |               |                                  |                                   | \$   |
| B                    | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY<br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED?<br>If yes, describe under SPECIAL PROVISIONS below  | 83WECIP3542   | 10/01/2008                       | 10/01/2009                        | <input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER |
|                      |  |               |                                  |                                   | E.L. EACH ACCIDENT \$ 1,000,000  |
|                      |  |               |                                  |                                   | E.L. DISEASE - EA EMPLOYEE \$ 1,000,000  |
|                      |  |               |                                  |                                   | E.L. DISEASE - POLICY LIMIT \$ 1,000,000   |
| B                    | OTHER Property   | 83SBAUN7715   | 10/01/2008                       | 10/01/2009                        | \$26,400-Replacement Cost Special Form   |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES / EXCLUSIONS ADDED BY ENDORSEMENT / SPECIAL PROVISIONS

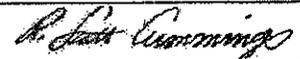
## CERTIFICATE HOLDER

## CANCELLATION

FOR EVIDENCE OF INSURANCE PURPOSES ONLY

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, THE ISSUING INSURER WILL ENDEAVOR TO MAIL 30 DAYS WRITTEN NOTICE TO THE CERTIFICATE HOLDER NAMED TO THE LEFT, BUT FAILURE TO MAIL SUCH NOTICE SHALL IMPOSE NO OBLIGATION OR LIABILITY OF ANY KIND UPON THE INSURER, ITS AGENTS OR REPRESENTATIVES.

AUTHORIZED REPRESENTATIVE  
Scott Cummings/JV



### *Who Are We?*

Owner Services Group, Inc. (OS) exists to represent owners by leading the project planning, design, and construction process. We first establish projects goals and then manage all project design and construction participants to meet or exceed our client's expectations relative to scope, quality, cost and schedule. Our staff includes Strategic Planners, Project Managers, Cost Managers, Schedulers, Construction Managers, and Architects. This multi-disciplined team enables us to represent owners on an expert-to-expert basis throughout the project process.

### *What Do We Do?*

OS provides the critical management and decision support services essential to achieving project goals. We have developed a systematic approach to managing the entire design and construction process. Our services include:

#### **Pre-Design Phase Management**

- Project Definition & Scope Determination
- Cost Analysis & Budget Preparation
- Design Professional Selection
- Fiscal Risk Management

#### **Design Phase Management**

- Design Professional Coordination
- Project Delivery Recommendation
- Design Document & Quality Review
- Cost Control
- Schedule Development
- Fiscal Risk Minimization Strategies

#### **Bidding and Award Phase Management**

- Bidder Pre-Qualification
- Bid Recommendation
- Schedule Review

#### **Construction Phase Management**

- On-Site Construction Administration
- Project Meeting Coordination
- Progress Payment Evaluation
- Critical Communication Management
- Critical Issue Resolution
- Quality Review
- Change Order Control
- Schedule Monitoring and Work Out Strategies

#### **Post-Construction Phase Management**

- Substantial and Final Completion Monitoring
- Operation & Maintenance Material Collection
- Close-Out Report Preparation

### *What Makes Us Different?*

- ◆ Our company and resources are strategically organized to represent Owners
- ◆ Objectivity: an unbiased perspective ensures actionable information and informed decision-making
- ◆ Planning: we believe in early definition of the Owner's objectives
- ◆ Process: we apply fundamental process management principals to meet or exceed all Owner objectives
- ◆ Expert-to-expert capability in all design and construction disciplines

### *What is the Benefit of Our Involvement?*

Optimizing investment value, maximizing quality and achieving established goals are central to our involvement. Our involvement typically saves owners and investors far in excess of our fee. Throughout our participation:

- ◆ We ensure compliance with Owner's project objectives
- ◆ Cost is controlled, risk is minimized, and projects are on-time
- ◆ We ensure the confidence of accurate, timely, and objective information
- ◆ The Owner is free to focus on their core business
- ◆ We get results



www.downers.us

**COMMUNITY RESPONSE  
CENTER**

630.434.CALL (2255)

**CIVIC CENTER**

801 Burlington Avenue

Downers Grove

Illinois 60515-4776

630.434.5500

TDD 630.434.5511

FAX 630.434.5571

**FIRE DEPARTMENT**

**ADMINISTRATION**

6701 Main Street

Downers Grove

Illinois 60516-3426

630.434.5980

FAX 630.434.5998

**POLICE DEPARTMENT**

825 Burlington Avenue

Downers Grove

Illinois 60515-4783

630.434.5600

FAX 630.434.5690

**PUBLIC WORKS**

**DEPARTMENT**

5101 Walnut Avenue

Downers Grove

Illinois 60515-4074

630.434.5460

FAX 630.434.5495

**DEPARTMENT OF  
COUNSELING AND SOCIAL SERVICES**

842 Curtiss Street

Downers Grove

Illinois 60515-4761

630.434.5595

FAX 630.434.5599

Ian Parr, President  
Owner Services Group, Inc  
1815 South Meyers Road, Suite 200  
Oakbrook Terrace, Illinois 60181

Attn: Ian Parr

Dear Mr. Parr,

On behalf of the Village of Downers Grove, I would like to thank Owner Services Group and their staff for their assistance in the construction of our new Fire Department Headquarters and Fire Station No. 2. As the Owner's Representative, your firm was an integral member of the design and construction team, which guided this project to a successful conclusion, bringing the project in on schedule and substantially under budget. Changes Orders were also kept to a minimum (approximately 1%). With a tight site and a short schedule, Owner Services Group, and Project Manager, Ed Disler, were vital in making the project team effective, and in communicating the progress of the project to the Village and an interested and involved community.

As our advocate in the selection process for the architect and contractor, we were able to assemble a high quality team that worked together to minimize conflict and keep the project on track, and the combined team effort resulted in a building of which the community of Downers Grove is proud.

Sincerely,

David Fieldman  
Village Manager  
Village of Downers Grove



# M&J WILKOW

October 11, 2007

Mr. Ian Parr, President  
Owner's Services Group  
1815 S. Meyers Road  
Suite 200  
Oakbrook Terrace, IL 60181

**RE: The Gage Building, 18 S. Michigan Avenue, Chicago, IL**

Dear Ian:

As you are aware, the renovation of the historic Gage Building has been a long and complicated process.

We have renovated a historic property with an existing tenant base to include a:

- M.E.P. Upgrade, including new restrooms on vacant floors
- ADA Compliance Upgrade
- Emergency generator installation
- Modernization of four passenger elevators
- Demolition and environmental abatement of vacant floors
- Installation of a new steam boiler
- Upgrade of Fire Life Safety Systems, including sprinklers
- Coordination of new restaurant build out and storefront renovation

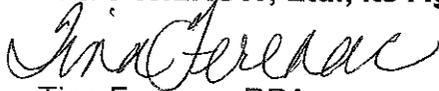
The list then goes on and on. Presently, we have undertaken a freight elevator modernization, replacement of south and west elevation windows, masonry repairs and the renovation of the Louis Sullivan first floor retail storefront and will begin building out vacant floors for new owners, as the property is converting to Office Condominiums. It has been quite a journey.

I have been with the property five years now and can honestly say this process would have been impossible without Owner's Services Group and Robert Kelly. The services offered by Owners Services and CCSOS have helped tremendously in establishing budgets, evaluating bids and coordinating over two dozen individual contracts. The knowledge and experience that Bob brings to the table have helped and saved me many times. With a project this complicated where every single project affects the development and completion of another project, Owner's Services and Bob have walked a very fine line keeping schedules moving, costs in check and communication open and flowing with the contractors, my staff and myself.

Congratulations to Owner's Services for a job very well done. I hope to have the opportunity to, in the future work with Owner's service and Bob again. Thank you for all your assistance on this project. The end result here at the Gage Building will be one to be proud of.

Very truly yours,

**GAGE FEE, LLC, by  
M & J WILKOW, Ltd., its Agent**

A handwritten signature in cursive script, appearing to read "Tina Ferenc".

Tina Ferenc, RPA  
General Manager

## Services

### COMMERCIAL

Apartment Complexes  
Industrial Complexes  
Financial Institutions  
Hotel Developments  
Medical Facilities  
Retail Centers  
Churches

### GOVERNMENT

Public Buildings  
Drainage  
Schools  
Roads

### UTILITIES

Potable Water  
Wastewater  
Domestic

### FEDERAL / DOD

NSA—Panama City, FL  
NAS Whiting Field, FL  
Hurlburt Field, FL  
Tyndall AFB, FL  
Eglin AFB, FL

### SURVEYING

## *Firm's Background*

jehle-halstead, inc. (formerly jehle engineering, inc.) was founded in 1987 by Donald P. Jehle, P.E., who was joined by Mr. Glenn P. Halstead in 1994 to form the present firm. Since that time the staff has grown to include 2 Registered Professional Engineers, 3 Design Engineers, 6 Designers/Civil Technicians, Surveying, and a staff of 2 other support personnel. During this time of growth and expansion, **jhi** has strived to maintain personalized, quality service as its number one priority. The firm has always held the belief that the clients' needs for reliable and cost-efficient services always come first. Its reputation for upholding this principal has allowed **jhi** to build and maintain a strong base of repeat clients who serve as our best reference for acquiring new business relationships.

The diversity of our civil engineering and surveying services is strongly supported by the knowledge and experience of our staff. The professional engineers of **jhi** have a combined 76 years (20 average) of hands-on experience in a wide variety of projects. The technical staff has an average of 20 years experience in providing design, drafting and construction support services. In addition, with an average length of employment with **jhi** of over 10 years, these highly qualified individuals have developed as a design team. This combination of strong individual experience coupled with an experienced team approach affords each of our clients the best in personal service tailored to each one's own particular needs.

**jhi** is a general, civil engineering and surveying firm that offers a full range of services including planning, design, permitting, and construction administration. Our client base is composed of Federal, State and local governmental agencies, school systems, public and private utility operators, architects, residential and commercial developers, and industry. The extent of our project experience includes airport experience with various Air Force Bases and the Pensacola Naval Air Station Runway/Apron Repairs, roadway and traffic design, water supply, treatment and distribution, wastewater collection, treatment and disposal, solid waste disposal, air quality permitting, stormwater collection, management and treatment, commercial land development, residential land development, recreational facilities, and other related activities.

Our surveying department offers a wide variety of surveying and mapping services. Several examples include As-Built Surveys, Boundary Surveys, Construction Layout Surveys, Topographic Surveys, Wetlands location and Subdivision Platting. For more specific purpose requirements, we also offer ALTA/ACSM Land Title Surveys, Control Surveys for GIS and Photogrammetric applications, GIS data collection, Mean High Water Line surveys, Docking Facility Surveys involving leases of Submerged State Lands and Surveys involving the Coastal Construction Control and Coastal Construction Setback Lines. High precision modern equipment using Topcon brand total stations, data collectors and GPS systems are used on all our surveying projects. Depending of the requirements of our clients, survey drawings can be furnished in both paper and/or digital formats (dwg. or .dxf formats). Survey point data is furnished in .txt format.

**jhi** is home-based in the beautiful cities of Pensacola and Pace, Florida. Its primary area of service includes the panhandle area of Florida, south Alabama and Mississippi.

RECEIVED JAN 30 2009



City of  
Pensacola

*America's First Settlement  
And Most Historic City*

*Financial Services  
Purchasing*

January 28, 2009

Donald P. Jehle  
Jehle-Halstead, Inc.  
49 East Chase Street  
Pensacola, FL 32502

Dear Mr. Jehle:

Please be advised that your company was approved on December 1, 2008 for the City of Pensacola's Small Business Enterprise program. Your company name will appear in the City's Vendor Directory and we will notify you of your re-certification date.

The City appreciates your participation in the SBE program and your continuing participation in its procurement efforts. If you have any questions in this matter, please contact Sharon Gafford at 435-1835.

Sincerely,

A handwritten signature in cursive script that reads "Sharon A. Gafford".

Sharon A. Gafford  
Administrative Officer II

SAG/rd

## *Who Are We?*

Construction Cost Systems, Inc., (CCS) is an independent consulting firm specializing in the preparation of construction cost estimates at all phases of design. Among the largest cost estimating firms in the United States, CCS has been providing owners and industry professionals with detailed, objective information that represents the scope, complexity and quality anticipated for their projects since 1979.

## *What Do We Do?*

CCS' full-time staff of cost professionals provides clients with an objective perspective of their project's scope of work and cost. Detailed cost estimates are useful decision-making tools and serve as benchmarks for validating project budgets as designs evolve. In addition to providing detailed cost estimates at all levels of design, our services also include:

- ◆ Program Phase Parametric Cost Estimating and Modeling
- ◆ Scheduling
- ◆ Life Cycle Costing
- ◆ Change Order Analysis
- ◆ Value Engineering
- ◆ Claims Evaluation / Litigation
- ◆ Bid Evaluation

## *What Makes Us Different?*

CCS is fundamentally different from other firms that offer cost estimating services due to our unique combination of:

- ◆ **Cost Expertise**  
With over twenty years of successful operation in cost management, our experience includes thousands of projects. This volume of projects exposes our cost managers to a wide range of cost and risk issues. As a result, we have developed a solid core competence in all aspects of project cost management.
- ◆ **In-House Capability in All Cost Management Disciplines Using State-of-the-Art Technology**
- ◆ **Objectivity**  
CCS is focused solely on time and cost issues and does not provide project design or construction services. Because of this, we are able to remain truly objective throughout the design and construction process.
- ◆ **Ability to Develop Detailed Estimates at Programming Stage**

## *What is the Benefit of Our Involvement?*

CCS provides objective, detailed cost estimates at all phases of design, which helps you maximize the value of your projects and allows you more time to focus on design. CCS' team of cost professionals provide you with:

- ◆ Accuracy
- ◆ Objectivity
- ◆ Detailed cost estimates that can be customized to several formats
- ◆ Full-service team of cost professionals in all construction disciplines
- ◆ Experience in all project types
- ◆ Results