

Cleveland Heights-University
Heights City School District

Statement of Qualifications for Owner's Representative Services

November 8, 2013





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Mr. Stephen A. Shergalis
Director of Business Services
Cleveland Heights-University Heights City School District
2155 Miramar Boulevard
University Heights, Ohio 44118

***Re: Request for Qualifications for Owner's Representative Services for
Cleveland Heights-University Heights City School District
Facilities Improvement Project***

Dear Mr. Shergalis:

Project Management Consultants LLC (PMC), with our partner, Regency Construction Services, Inc. (RCSI), is pleased to submit this response to the Request for Qualifications for Owner's Representative Services. We believe the proposed Cleveland Heights-University Heights City School District Facilities Improvement Project to be among the most exciting and important projects currently underway in northeast Ohio. Both PMC and RCSI have had the honor and privilege of working with the District over the past three years in the development of the Master Facilities Plan, and, with this knowledge, we bring the team leadership necessary to guide the District through this major endeavor. We are tremendously enthused about the prospect of working again with your outstanding team as Owner's Representative.

We will address your needs for project representation with our Executive Team of Jeff Appelbaum and Tari Rivera and a Key Core Team consisting of Steve Zannoni, serving as Senior Project Manager; Pat O'Brien, as Management Project Manager; Scott Wagner, as Pre-Construction Project Manager; and Kevin Wise, as Construction Project Manager. These highly-skilled individuals will spend on average between 25% to 50% of their time through the course of the project; and, at key milestones or critical points, 100% of their time will be dedicated to this exciting project. In addition to the Key Core Team, we have assembled an 18-person support team who will provide support at both an administrative level and a defined task level throughout the project. We have assembled a comprehensive team that will meet all of the owner's representation needs for the District.

We believe our role as Owner's Representative is to be an extension of the Cleveland Heights-University Heights City School District staff, which is why we are proposing to locate our Key Core Team members and administrative staff within the District. In our response to the Facilities and Equipment section of the RFQ, we offer some possible options of not only setting up the Owner's Representative office within the District, but establishing a complete project office that will become the hub for the project.



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We believe that we are the most qualified firm to serve as your Owner's Representative because:

- Our team has extensive experience in all aspects of K-12 projects; and, for over 12 years, we have worked with Ohio school districts, both large and small, on their facilities programs.
- Our team has an excellent working relationship with the Ohio Facilities Construction Commission (OFCC) and its predecessor, the Ohio School Facilities Commission. Since 1999, PMC has provided consulting services to the Commission, including the development of the Commission's Partnering Program.
- Due to our knowledge of alternative project delivery models, PMC has assisted the State of Ohio with the development and implementation of Ohio Construction Reform. We are well equipped to assist your District with making decisions on the use of either CM at Risk or Design-Build so as to implement your Building Program with great success.
- RCSI has established successful management tools for budgeting, scheduling, reporting, purchasing and monitoring for numerous Ohio school district building programs, including Lakewood City School District, whose program has similar features.
- Our EDGE team member, HLMS, has supported school districts and other public owners with the tools for making informed sustainability decisions. HLMS's use of a LEED Cost Matrix will help your District make LEED decisions that meet your needs, and not just the need of attaining LEED points.
- Minority Business Solutions (MBS) will be supporting us in creating meaningful participation of EDGE firms for your project. MBS has been responsible for the successful implementation and monitoring of Minority, Female and Small Business participation on the Cleveland Public Schools Building Project, the Cleveland Convention Center and Global Center for Health Innovation project, and multiple projects for University Hospitals.
- As your Owner's Representative, we will become members of the Cleveland Heights-University Heights City School District community, including engaging the students. We will engage RCSI's unique student centered programs that provide an opportunity for students to learn and participate in a once-in-a-lifetime project.
- We will assist the District in providing the information necessary to maintain the transparency to and sharing of information with the Cleveland Heights-University Heights community.



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Thank you for the opportunity to present our response to your Request for Qualifications. Please feel free to contact me or Steve Zannoni if you have any additional questions or comments.

Very truly yours,

Jeffrey R. Appelbaum
Managing Director/PMC

cc: Tari S. Rivera
John D. Sanner
Steven J. Zannoni

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1. firm history- pmc



Project Management Consultants LLC (PMC) is a multi-disciplinary organization consisting of seasoned, construction, design, finance and real estate professionals, including licensed architects, engineers, construction managers, financial strategists, and experienced construction lawyers. PMC is headquartered in Cleveland with satellite offices in Columbus and Cincinnati, and is an Ohio limited liability company.

PMC was founded in 1997 as a wholly owned subsidiary of the law firm Thompson Hine LLP. Jeff Appelbaum, the founder and managing director, has over 35 years of construction law experience and recognized the need for consulting services beyond legal representation to satisfy the project management needs of owners. In establishing PMC, Appelbaum assembled a team of professionals with extensive experience in design, finance, construction consulting, construction management, partnering facilitation and owner's representation services.

We provide four primary services to the construction industry:

Owner's representation. As Owner's Representative PMC performs as the Owner's agent, furnishing our best skills and judgment to accomplish a quality-controlled project on time and within budget. We monitor and advise the Owner regarding the status of the project schedule and project cost, as well as the quality of construction.

PMC has served as Owner's Representative for a variety of projects including across the country, including museums, libraries, assisted living/care facilities, stadiums, schools, universities, office buildings and parking facilities. We have provided this service for a diverse group of clients such as The Lake Local School District the first Ohio School district to implement a Design Build School project with a GMP, the Pittsburgh Pirates (PNC Park), The A.M. McGregor Home, Cleveland Heights-University Heights Public Library, Museum of Modern Art Cleveland (MOCA), Cleveland Hearing and Speech Center, the Cleveland Medical Mart and Convention Center, and Case Western Reserve University.



Project and risk management consulting. PMC serves in the role of project delivery and risk management consultant on a number of museums, stadiums, arenas and institutional, commercial and industrial facilities, including the Miami Ballpark (Florida Marlins), Busch Stadium (St. Louis Cardinals), Target Field (Minnesota Twins), Amway Center (Orlando Magic), and the 49ers Stadium Project (San Francisco).

Design and construction partnering facilitation and mediation. Partnering is a project method that is implemented at the beginning of a project to promote consistent, rational and positive communication. **PMC's professional facilitators work with the project team to establish working relationships and communication channels. Collaboratively defining**



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roles, schedules and objectives early on improves the quality of the project and reduces disputes. We have provided these services for hundreds of projects throughout the United States. Our clients include the Ohio State University, Over 250 Ohio School districts including the major urban districts of Cleveland, Columbus, Cincinnati, Dayton and Toledo, The Ohio School Facilities Commission, The Cleveland Orchestra, the California Academy of Sciences, Saint Joseph Hospital in Denver, the Cleveland Botanical Garden, and the September 11 Memorial and Museum Project in New York City.

Public and private financing consulting. PMC provides assistance in obtaining public/private financing for real estate development, assisting clients with identifying financing and other strategies necessary to facilitate project objectives. Some of our most recent clients include Developers Diversified Realty Corporation, Fairmount Properties, University Circle Incorporated, LifeBanc, American Greetings and the Flats East Development LLC.

menu of services

- Project scope development
- Strategic planning
- Preliminary feasibility analysis
- Program evaluation
- Project budgeting
- Project delivery modeling
- Site investigation & evaluation
- Real estate analysis
- Public financing including bond financing negotiation
- Pro forma development and financial feasibility analysis
- Tax increment financing, new markets and historic tax credit strategies
- Preliminary project schedules
- Consultant selection and methodology
- Risk management
- Consultant agreement negotiations
- Documentation and reporting (24/7 project extranet site)
- Design process representation
- Design document and quality review
- Partnering and facilitation services
- LEED compliance oversight
- Facilitated GMP

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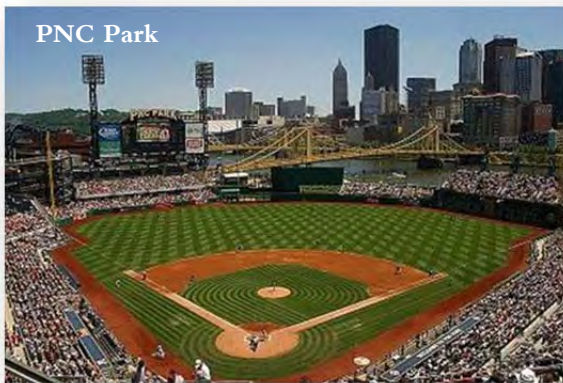
- Municipal / regulatory approvals
- Bid analysis and recommendations
- Financial tracking and cost controls
- Construction representation and oversight
- Change order management
- Dispute resolution services
- Commissioning oversight
- Project closeout oversight

additional resources:

Thompson Hine LLP, our parent organization provides:

- transactional services
- front end documents
- real estate and public finance counsel

PMC provides owners with the management and process tools for a successful building project. With our understanding of and experience in the construction industry, PMC can provide Cleveland Heights University Heights City Schools with comprehensive professional support throughout the building process, and assist you in achieving your project goals.



1. firm history- Regency

	<p>Regency Construction Services, Inc. (S Corp) 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 t 216.529.1188 www.regencycsi.com</p>
<p>Overview</p>	<p>Having completed well over \$2 billion of construction projects since its inception in 1994, Regency Construction Services, Inc. provides preconstruction and construction services for a broad spectrum of programs that includes education, healthcare, and civic clients. The company offers a variety of delivery approaches including Agency Based and At-Risk Construction Management, Design/Build, Owner's Representation and General Contracting. Regency also provides adjunct support services such as scheduling, estimating, constructability review and BIM related services to client during the design phases of their programs to identify project costs and projected timelines.</p> <p>The firm's portfolio includes a broad range of project types and complexities that includes the completion of 125 new and renovated PK-12 school facilities for 45 school districts state wide. A significant number of those facilities were constructed for districts in Northeastern Ohio. These districts include Bay Village, Lakewood, Fairview Park, Olmsted Falls, Shaker Heights, North Royalton, Hudson, and Aurora to name a few. Paralleling our PK-12 work is our work for colleges and universities around the state. A few of the institutions we have provided supported to include Case Western, Cleveland State, The Ohio State University, Ohio University, Tri C, Lorain County Community College, Bowling Green, Kent State and Toledo. This higher education experience has been invaluable and has aided us in participating in the development of the 21st Century Vision for PK-12 level programs.</p> <p>As a Female Business Enterprise, diversity and opportunity in the workplace have been a core value of Regency Construction since its inception 19 years ago by Tari Rivera. The company's best practices in diversity in the workplace have been presented at local, state, and national programs. Regency also has a long tradition of active involvement in the community, working with the National Association of Women in Construction, the National ACE Organization, a number of community boards and chambers of commerce, and was recently honored as a Weatherhead 100 Firm.</p>
	 

2a. key personnel

Resumes detailing the technical training ,education and experience of the firm's owners and key personnel who will be assigned to perform services on the Project.

Key Core Team

As we analyzed the complexity and phasing of the project, we are proposing a Key Core Team of professionals to act as Owner's Representative for the Cleveland Heights-University Heights School District Facilities Improvement Project. Since the Cleveland Heights-University Heights Master Plan will have projects simultaneously in Planning, Design, Construction and Move-In we have proposed a team of project managers each focusing on a set of defined tasks. The Key Core Team will be headed by Steve Zannoni as Senior Project Manager. Steve will be responsible for Overall Project Oversight. Pat O'Brien will be the Management Project Manager, Scott Wagner will be Pre-Construction Project Manager and Kevin Wise the Construction Project Manager. These highly skilled individuals will spend on average between 25% to 50% of their time through the course of the project and at key milestones will dedicate 100% of their time to the project. The Key Core Team will be assisted by an 18-person project team who will support the project both on an administrative level and defined task level throughout the project. As part of our response we have provided a detailed organization chart, staff responsibility chart and resumes of team members.





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2b. organizational chart



* Will work with the District to select MEP peer review consultant.

2c. responsibility list

Scope of Work – Project Team Responsibility List

Managing and overseeing the entire project or portions thereof as the owner's representative through all phases of the project, including the planning/programming, design, construction document, construction, and closeout phases.

- Steve Zannoni, Pat O'Brien, Scott Wagner, Kevin Wise

Facilitating the determination of the project delivery model which may include competitive bidding, design-build and/or construction manager at risk.

- Jeff Appelbaum, Steve Zannoni

Assisting in preparing and negotiating all contracts and transactional agreements required for implementation of the project.

- Jeff Appelbaum, Pat Sweeney, Heather Bartzi

Managing the selection of all consultants, including preparing requests for qualifications and request for proposals, as requested, in the review of contract award recommendations.

- Steve Zannoni, Heather Bartzi, Pat Sweeney

Managing all consultants and constructors including architects, owner specialty consultants, construction managers, design-builders and owner supplied contractors and serving as liaison with such persons and with the Ohio School Facilities Commission.

- Steve Zannoni, Pat O'Brien, Scott Wagner, Kevin Wise

Managing Owner personnel with the project team.

- Pat O'Brien, Brian Koss, Eric Gonczy

Managing the entire project budget.

- Scott Wagner, Ron Koss, John Verikakis, Pete Wielicki

Scope of Work – Project Team Responsibility List

Managing and maintaining the overall project schedule.	<ul style="list-style-type: none"> Kevin Wise, Scott Wagner, Brian Koss, Jason Calvey
Managing all payments and disbursement of Owner funds for the project.	<ul style="list-style-type: none"> Scott Wagner, Kevin Wise, Pete Wielicki, Brian Koss, Ron Koss
Managing all Owner moves including swing and permanent spaces.	<ul style="list-style-type: none"> Kevin Wise, Brian Koss, John Sanner
Procuring Owner bought items outside the construction contracts.	<ul style="list-style-type: none"> Scott Wagner, Kevin Wise, Brian Koss, Ron Koss, Pete Wielicki
Participating in partnering and facilitation, including executive, contractor, closeout, intervention and facilitated guaranteed maximum price sessions.	<ul style="list-style-type: none"> Steve Zannoni, Jeff Appelbaum, Pat O'Brien, Tom Kirkwood, Laura Steinbrink, Margaret Hewitt
Assisting in preparation of guaranteed maximum price amendments for construction manager at risk and/or design-build contracts.	<ul style="list-style-type: none"> Jeff Appelbaum, Steve Zannoni, Pat O'Brien, Julie Criscione, Eric Gonczy
Managing Owner personnel through the closeout process for each school, including training and documentation.	<ul style="list-style-type: none"> Pat O'Brien, Kevin Wise, Brian Koss
Establishing and maintaining all project communication, both internal to the owner and external to all consultants, constructors and vendors.	<ul style="list-style-type: none"> Pat O'Brien, Scott Wagner, Kevin Wise, Steve Zannoni, Cathy Dougan

Scope of Work – Project Team Responsibility List

Acting on behalf of the Owner with respect to decisions required by the Owner during the design and construction phases.

- Steve Zannoni, Pat O'Brien, Scott Wagner, Kevin Wise.

Managing communication for the Owner with the Ohio School Facilities Commission.

- Steve Zannoni, Pat O'Brien

Participating in planning, design, scheduling, estimating, pre-construction, budget, progress meetings and other related construction meetings, and obtain and review meeting minutes.

- Steve Zannoni, Pat O'Brien, Scott Wagner, Kevin Wise, Brian Koss, Monica Bruaw,

Representative shall participate in activities related to final conformance, interpretations and acceptance of a consultant's and contractor's work and give approvals thereon where requested.

- Kevin Wise, Brian Koss, Pat O'Brien, Carol Kempton, Monica Bruaw, John Verikakis, Jason Calvey

The representative shall accompany, with the Construction Manager and/or Architect, visiting inspectors representing public or other agencies having jurisdiction over the project.

- Steve Zannoni, Pat O'Brien, Scott Wagner, Kevin Wise

Managing and monitoring the EDGE contractor program.

- Tari Rivera, Arlene Anderson


The representative shall consider and approve requests for permits for occupancy, either in whole or in part.

- Kevin Wise, Brian Koss

The representative shall consider and approve consultant or contractor certifications of contract completion and certifications of warranty commencement.

- Kevin Wise, Pat O'Brien, Brian Koss


2d. resumes:key personnel

	<p>Steven J. Zannoni</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5838 t Steven.Zannoni@AboutPMC.com</p>
<p>Summary</p>	<p>Mr. Steve Zannoni is a noted Cleveland Architect and his experience encompasses the architectural design, construction, and project oversight of educational facilities, public buildings, medical facilities, theaters, and historic buildings for profit and non-profit organizations.</p> <p>As a director of Project Management Consultants (PMC), Mr. Zannoni heads PMC's Owner's Representation Services Group providing clients with a complete management program to navigate the complexities of today's building projects. In addition to his role as an Owner's Representative, Mr. Zannoni provides neutral partnering facilitation services, assisting clients with a proactive approach to dispute management. Using this same partnering approach, he has also facilitated a number GMPs (Guaranteed Maximum Prices) for significant building projects including the Kauffman Stadium project for the Kansas City Royals.</p>
<p>Education</p>	<p>University of Notre Dame-South Bend, Indiana, Bachelor of Architecture Rice University, Houston, Texas, Post Graduate Studies</p>
<p>Proposed Project Role Duties and Responsibilities</p>	<p>Senior Executive Team/ Senior Project Manager</p> <p>Please refer to Project Team Responsibility Chart(Section B-1b.) for detail</p>
<p>Prior Experience on Similar Projects</p>	<p>OSFC – 150+ school districts state-wide including Columbus City Schools, Cincinnati Public Schools and Dayton Public Schools; Owner's Representative for multiple non-profit & municipal projects in N.E. Ohio</p>
<p>Time Commitment for this Project</p>	<p>Steve Zannoni's time commitment will be an average between 25% - 50% through the course of the project and at key milestones or critical points, he will dedicate 100% of his time to the project.</p>


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	<p>Patrick J. O'Brien</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5695 t Pat.O'Brien@AboutPMC.com</p>
<p>Summary</p>	<p>As a registered Professional Engineer, Certified Construction Manager and Project Management Professional, Dr. Pat O'Brien has over 25 years of Design, Program and Construction Management experience. He has successfully managed over \$500 million in Ohio school construction projects and in addition facilitated over 200 OSFC school building partnering sessions for the State of Ohio. Prior to working on schools projects, Pat managed the design and construction of major retail and transportation facility projects nationwide. On the design side, Pat has provided structural design solutions for bridges and related structures on major highway projects, and nuclear power plant projects.</p>
<p>Education</p>	<p>Walden University, Doctor of Philosophy, Engineering Management University of Pittsburgh, Master of Science in Library Science University of Pittsburgh, Bachelor of Arts in History Pennsylvania State University, Bachelor of Science in Civil Engineering</p>
<p>Proposed Project Role Duties and Responsibilities</p>	<p>Project Manager</p> <p>Please refer to Project Team Responsibility Chart(Section B-1b.) for detail</p>
<p>Prior Experience on Similar Projects</p>	<p>Lake Local School District; OSFC – 200+ school districts state-wide including Columbus City Schools, Cincinnati Public Schools and Dayton Public Schools; Port Clinton City Schools; Rocky River City Schools, Austintown Local Schools</p>
<p>Time Commitment for this Project</p>	<p>Pat O'Brien's time commitment will be an average between 25% - 50% through the course of the project and at key milestones or critical points, he will dedicate 100% of his time to the project.</p>

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	<p>Scott Wagner</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t wagners@RegencyCSI.com</p>
<p>Summary</p>	<p>As Project Manager, Mr. Wagner is responsible for overall coordination of multiple projects by providing direction and control. He monitors and directs the daily construction through Regency's on-site superintendents and project engineers to ensure projects are completed on time and within budget. Mr. Wagner establishes all project objectives, policies, procedures and performance and quality standards. He initiates communication and is a liaison between the owner and design professionals.</p>
<p>Education</p>	<p>University of Akron; B.S., Construction Management Baldwin Wallace College; B.A., Speech Communication</p>
<p>Proposed Project Role Duties and Responsibilities</p>	<p>Preconstruction Project Manager</p> <p>Please refer to Project Team Responsibility Chart(Section B-1b.) for detail</p>
<p>Prior Experience on Similar Projects</p>	<p>Antwerp Local, Bucyrus City, Cardington-Lincoln Local, Cleveland Municipal, Crestview Local, East Guernsey Local, Elyria City Schools, Fairless Local, Fairview Park, Franklin Local, Hudson City Schools, Knox County Career, Technology Center, Lakewood City, Licking Heights Local, Montpelier Exempted Village, Mt. Gilead Local, North Union Local, Olmsted Falls City, OSFC-ELPP, Patrick Henry Local, Plymouth Shiloh, Strasburg-Franklin Local, Windham Local</p>
<p>Time Commitment for this Project</p>	<p>Scott Wagner's time commitment will be an average between 25% - 50% through the course of the project and at key milestones or critical points, he will dedicate 100% of his time to the project.</p>

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	<p>Kevin Wise</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t WiseK@RegencyCSI.com</p>
<p>Summary</p>	<p>As Regency's Construction Operations Manager, Mr. Wise is in charge of all Regency field staff and he oversees Quality Assurance and Quality Control on Regency projects. He monitors daily activity, document control and record keeping for consistency, quality and conformity with Regency's best practices.</p> <p>In his role Mr. Wise also monitors daily construction activities through Regency's on-site superintendents and project engineers ensuring that each project is completed on time and within budget. He establishes specific project objectives and is the main liaison with the owner and design professionals.</p>
<p>Education</p>	<p>Bowling Green State University; B.A., Construction Management</p>
<p>Proposed Project Role Duties and Responsibilities</p>	<p>Construction & Post Construction Project Manager</p> <p>Please refer to Project Team Responsibility Chart(Section B-1b.) for detail</p>
<p>Prior Experience on Similar Projects</p>	<p>Breakthrough Schools, EnVision Student Housing for the University of Akron, Cuyahoga Community College, The Ohio State University, Elyria City Schools, Bucyrus City Schools, Cardington-Lincoln Local Schools, Crestview Local Schools, Knox County Career Center, Licking Heights Local Schools, Mt. Gilead Exempted Village Schools, North Union Local Schools, Strasburg-Franklin Local Schools.</p>
<p>Time Commitment for this Project</p>	<p>Kevin Wise's time commitment will be an average between 25% - 50% through the course of the project and at key milestones or critical points, he will dedicate 100% of his time to the project.</p>

	<p>Jeffrey R. Appelbaum</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5548 t Jeff.Appelbaum@AboutPMC.com</p>
<p>Summary</p>	<p>For over 30 years, Mr. Jeff Appelbaum has served the construction industry in the varying roles of transactional attorney, project counsel, project management consultant, mediator, partnering facilitator and trial attorney. Jeff has provided distinguished service to public and private owners, design professionals, construction managers and contractors on important projects throughout the United States and Canada. He has served as project management consultant or project counsel for over 75 projects involving billions of dollars of construction, including 20 major league and professional sports facilities and other community impact projects throughout North America. During the past five years, he has facilitated over 150 partnering sessions and served as mediator for successful resolution of over 100 major construction claims. Chambers USA has rated Jeff as the top construction lawyer in Ohio since Chambers began rating lawyers.</p>
<p>Education</p>	<p>Cornell Law School; J.D.; <i>cum laude</i> Cornell University, B.A.; with distinction</p>
<p>Proposed Project Role</p>	<p>Senior Executive Team Project Delivery/Legal</p>
<p>Prior Experience on Similar Projects</p>	<p>OSFC – 200+ school districts state-wide including Columbus City Schools, Cincinnati Public Schools and Dayton Public Schools; negotiated construction contracts for school districts state-wide; mediated school construction claims state-wide; facilitator for Ohio Construction Reform Committee; integral in creating new contracts for Ohio Construction Reform</p>


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	<p>Tari S. Rivera</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t RiveraT@RegencyCSI.com</p>
<p>Summary</p>	<p>Ms. Rivera is responsible for the overall corporate business planning, financial matters and implementation of company policies of Regency Construction Services. She also negotiates major contracts, monitors the ongoing progress of each project and reviews each project's final budget. Ms. Rivera brings over 26 years of construction experience to each project.</p>
<p>Education</p>	<p>The University of Akron; MBA Management, BS Construction Management</p>
<p>Proposed Project Role</p>	<p>Senior Executive Team</p>
<p>Prior Experience on Similar Projects</p>	<p>Antwerp Local Schools, Ashtabula JVS, Aurora City Schools, Barnesville Local Schools, Bellaire City Schools, Buckeye Central Local Schools, Bucyrus City Schools, Cardington-Lincoln Local Schools, Cleveland Heights-University Heights SD, Coshocton City Schools, Crestview Local Schools, East Guernsey Local Schools, Edon-Northwest Schools, Elyria City Schools, Fairless Local Schools, Fairview Park City Schools, Genoa Area Local Schools, Indian Valley Local Schools, Knox County Career Center, Lakewood City Schools, Mahoning County Career Center, Newcomerstown Ext. Village Schools, North Ridgeville City Schools, North Royalton City Schools, North Union Local Schools, OSFC Emergency Repair Program, OSFC ELPP, Olmsted Falls City Schools, Our Lady of the Elms, Paulding Ext. Village Schools, Perry Local Schools, Ridgewood Local Schools, Shaker Heights City Schools, Springfield Local Schools, Strasburg-Franklin Local Schools, Wayne Trace Local Schools</p>

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	<p>John D. Sanner</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t 216.529.0777 f SannerJ@RegencyCSI.com</p>
<p>Summary</p>	<p>Mr. Sanner is principal-in-charge of all general corporate planning and scheduling services of Regency Construction Services, bringing over 44 years of design and construction project management experience to each assignment. Mr. Sanner has owned and operated an Ohio based construction management firm and has held positions of project manager, project engineer and manager of project support services. Mr. Sanner has planned and scheduled more than \$10 billion of construction projects.</p>
<p>Education</p>	<p>Cleveland State University; B.S., Civil Engineering</p>
<p>Proposed Project Role</p>	<p>Senior Executive Team</p>
<p>Prior Experience on Similar Projects</p>	<p>Antwerp Local Schools, Ashtabula JVS, Aurora City Schools , Barnesville Local Schools, Bellaire City Schools, Buckeye Central Local Schools, Bucyrus City Schools, Cardington-Lincoln Local Schools, Cleveland Heights-University Heights SD, Coshocton City Schools, Crestview Local Schools, East Guernsey Local Schools, Edon-Northwest Schools, Elyria City Schools, Fairless Local Schools, Fairview Park City Schools, Genoa Area Local Schools, Knox County Career Center, Lakewood City Schools, Mahoning County Career Center, Newcomerstown Ext. Village Schools, North Ridgeville City Schools, North Royalton City Schools, North Union Local Schools, OSFC Emergency Repair Program, OSFC ELPP, Olmsted Falls City Schools, Our Lady of the Elms , Perry Local Schools, Ridgewood Local Schools, Shaker Heights City Schools, Springfield Local Schools, Strasburg-Franklin Local Schools, Wayne Trace Local Schools</p>


3. resumes: support staff

	<p>Monica Bruaw</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t BruawM@RegencyCSI.com</p>
<p>Summary</p>	<p>In addition to her responsibilities as an OSFC Regional Program Consultant, Ms. Bruaw leads the Ohio School Design Manual (OSDM) review team on new schools, combination schools, renovation and addition projects. Her experience with the RPC program gives her a depth of understanding of OSDM requirements that enables accurate and efficient OSDM reviews.</p>
<p>Education</p>	<p>Miami University of Ohio; B.S., Management</p>
<p>Proposed Project Role</p>	<p>Planning/Programming Validation</p>
<p>Prior Experience on Similar Projects</p>	<p>Arlington Local Schools, Bath Local Schools, Bluffton Exempted Village Schools, Borkins Local Schools, Buckeye Valley Local Schools, Canal Winchester Local Schools, Celina City Schools, Cleveland Metropolitan Schools, Defiance City Schools, Delaware City Schools, Elida Local Schools, Findlay City Schools, Fremont City Schools, Genoa Area Local Schools, Jackson City Local Schools, Perry Local Schools, Pleasant Local Schools, Russia Local Schools, Sidney City Schools, St. Mary's City Schools, Vanlue Local Schools, Wapakoneta City Schools, Woodmore Local Schools.</p>
<p>Time Commitment for this Project</p>	<p>Approximately 5% throughout the design phase and perhaps 5% at the quarterly review periods by OSFC's assigned RPC during construction.</p>

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	<p>Jason Calvey</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t calveyj@RegencyCSI.com</p>
<p>Summary</p>	<p>Manager of Scheduling and BIM Team Leader. Jason will consolidate all program related items into one master control schedule. This schedule will account for Owner items, design team(s) activities, regulatory agency activities and global construction components.</p>
<p>Education</p>	<p>Columbus State Community College; B.S., Construction Management</p>
<p>Proposed Project Role</p>	<p>Master Scheduling, Phasing, Logistic & Move Management, Validation Constructability/BIM Review and Validation</p>
<p>Prior Experience on Similar Projects</p>	<p>Bucyrus City Schools, Elyria City Schools, Mt. Gilead Local Schools, North Union Local Schools, Our Lady of the Elms, Strasburg-Franklin Local Schools, Genoa Elementary School, Springfield Local Schools.</p>
<p>Time Commitment for this Project</p>	<p>5% during design phases</p>


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	<p>Brian Koss</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t KossB@RegencyCSI.com</p>
<p>Summary</p>	<p>Mr. Koss is responsible for the preparation, tracking and maintaining files of all documents, including closeout documents that pertain to the project, including correspondence and transmittal submittals. He is responsible for monthly billings and statements, construction cost comparisons and monthly budget tracking. He distributes bid packages to prospective trade contractors. He also writes and publishes weekly progress meeting minutes and records billings for all trade contractors.</p>
<p>Education</p>	<p>The University of Akron; B.S., Construction Technology</p>
<p>Proposed Project Role</p>	<p>Project Engineer</p>
<p>Prior Experience on Similar Projects</p>	<p>Elyria High School, Olmsted Falls City Schools, Our Lady of the Elms, Northcoast Behavioral Campus, St. John West Shore Hospital, Lorain County Community College, MetroHealth Systems, FBI SCIF Renovation, Cleveland Museum of Art, Shaker Heights City Schools, Lakewood Hospital, Selman and Company, St. Vincent Charity Hospital.</p>
<p>Time Commitment for this Project</p>	<p>25% during design phase of projects and 50% during construction.</p>


Statement of Qualifications for Owner's Representative Services


	<p>Ron Koss</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t KossR@RegencyCSI.com</p>
<p>Summary</p>	<p>Mr. Koss is responsible for the preparation of plumbing and mechanical estimates. He participates in the scope review, prepares quantity take-offs and develops pricing and direct cost data for assigned projects. Regency's clients benefit from the 20 years of experience in construction management, scheduling and logistics and purchasing that Mr. Koss brings to his work.</p>
<p>Education</p>	<p>Lorain County Community College Cleveland State University</p>
<p>Proposed Project Role</p>	<p>Budget, Cost Setting and GMP</p>
<p>Prior Experience on Similar Projects</p>	<p>Cleveland Heights-University Heights School District, Western Reserve Historical Society, LCCC University Center Ridge Campus, LCCC SMART Building, Akron University; Polymer Lab, Springfield LSD; New 7-12 School, Sheffield Lake City Schools; New 7-12 School Miami University – Armstrong Student Center, Lutheran Hospital, Greater Cleveland RTA, Greater Cleveland YWCA Independence Place, Elyria Schools, Mahoning County Career & Technical Center, Olmsted Falls City Schools, Strasburg-Franklin Local Schools, Bowling Green State University, Kent State University, The University of Toledo, The Ohio State University, Genoa Elementary School, Buckeye Central School, Ursuline College.</p>
<p>Time Commitment for this Project</p>	<p>5% to 10% during design phase.</p>

Statement of Qualifications for Owner's Representative Services

	<p>John Verikakis</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t Verikakisj@RegencyCSI.com</p>
<p>Summary</p>	<p>Manager of Estimating with day-to-day coordination of Regency's five person estimating team. John has estimated over \$1 billion of PK-12 schools. He participates in scope reviews, prepares quantity takeoffs and develops pricing and direct cost data as it specifically pertains to the mechanical, electrical, and plumbing aspects of projects. Mr. Verikakis' responsibilities include electrical equipment, data control systems and lighting, sanitary and storm systems, natural gas systems, plumbing equipment fixtures, piping and fire protection.</p>
<p>Education</p>	<p>Cleveland State University; B.S., Civil Engineering</p>
<p>Proposed Project Role</p>	<p>Budget Setting & Cost/GMP Validation Constructability/BIM Review and Validation</p>
<p>Prior Experience on Similar Projects</p>	<p>Cardington-Lincoln Schools, Cleveland Heights-University Heights School District, Elyria City Schools, Fairless Local Schools, Fairview Park City Schools, Franklin Local Schools, Genoa Area Local Schools, Indian Valley Local Schools, Lakewood City Schools, Licking Heights Local Schools, Licking Valley Local Schools, Newcomerstown Ex. Village Schools, North Union Local Schools, Olmsted Falls City Schools, Ridgewood Local Schools, Strasburg-Franklin Local Schools.</p>
<p>Time Commitment for this Project</p>	<p>5% to 10% during design phases</p>


Statement of Qualifications for Owner's Representative Services

	<p>Pete Wielicki</p> <p>Regency Construction Services, Inc. 14600 Detroit Avenue, Suite 1495 Lakewood, Ohio 44107 216.529.1188 t WielickiP@RegencyCSI.com</p>
<p>Summary</p>	<p>Mr. Wielicki brings more than 30 years of estimating and consulting experience in all disciplines to Regency clients. He participates in scope reviews, prepares quantity takeoffs, and develops pricing and direct cost data as it specifically pertains to the architectural, structural and civil components associated with a project. His responsibilities include masonry, metals, roofing, openings, finishes specialties, furnishings, etc.</p>
<p>Education</p>	<p>Cuyahoga Community College; B.S., Construction Technology</p>
<p>Proposed Project Role</p>	<p>Budget, Cost Setting and GMP</p>
<p>Prior Experience on Similar Projects</p>	<p>Cleveland Heights-University Heights School District, Western Reserve Historical Society; LCCC University Center Ridge Campus, LCCC SMART Building, Akron University; Polymer Lab, Springfield LSD; New 7-12 School, Sheffield Lake City Schools; New 7-12 School; Miami University – Armstrong Student Center, Elyria City Schools, Mahoning County Career & Technical Center, Olmsted Falls City Schools, Strasburg-Franklin Local Schools; Genoa Elementary School, Buckeye Central School, Ursuline College</p>
<p>Time Commitment for this Project</p>	<p>5% to 10%</p>


	<p>Patrick J. Sweeney</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5793 t Pat.Sweeney@AboutPMC.com</p>
<p>Summary</p>	<p>Mr. Pat Sweeney is a partner in the firm's Construction and Real Estate Practice Groups. His practice involves all aspects of commercial real estate, including purchases and sales, financing and leasing. A significant portion of his work involves "front end" aspects of construction projects, including preparation and review of construction documents, negotiation of construction and design professional agreements, and project management counseling in a wide variety of projects, including regional shopping malls, industrial projects, offices and hotels and sports venues such as Major League Baseball parks, National Basketball Association arenas and National Hockey League arenas. He has prepared and negotiated agreements on behalf of architects, engineers, owners and contractors. Mr. Sweeney is co-chair of the Construction Subcommittee of the Real Estate Section of the Cleveland Bar Association and has lectured extensively on construction contracting issues with a variety of trade groups, the American Arbitration Association, the American Bar Association, the Ohio State Bar Association and the Cleveland Bar Association.</p>
<p>Education</p>	<p>Cleveland-Marshall College of Law; J.D. College of Wooster; B.A.</p>
<p>Proposed Project Role</p>	<p>Project Delivery/Legal</p>

	<p>Thomas J. Kirkwood</p> <p>Project Management Consultants LLC 312 Walnut Street, 14th Floor Cincinnati, Ohio 45202-4089 513.252.6728 t Tom.Kirkwood@AboutPMC.com</p>
<p>Summary</p>	<p>As a principal construction consultant in Project Management Consultants, Tom Kirkwood has provided a broad range of consulting and facilitation services to more than a hundred multi-million dollar construction projects with budgets totaling more than \$7 billion in the aggregate. Since 1999, he has facilitated more than four hundred project meetings and disputes about:</p> <ul style="list-style-type: none"> ➤ trade contractor partnering and problem resolution plans ➤ architect and construction manager team communication ➤ RFI and change order processes ➤ project controls systems ➤ budget and program management ➤ owner organizational systems for managing large projects ➤ executive planning for major project budget issues ➤ scheduling and job progress strategies ➤ project commissioning ➤ project close out ➤ dispute and claims resolutions ➤ project strategic planning <p>Tom has formal mediator training with the CPR Institute For Dispute Resolution (1996) and AAA arbitration training.</p>
<p>Education</p>	<p>University of Cincinnati College of Law; J.D. University of Cincinnati; B.A.</p>
<p>Proposed Project Role</p>	<p>Partnering Facilitation</p>
<p>Prior Experience on Similar Projects</p>	<p>OSFC – 150+ school districts state-wide including Columbus City Schools, Cincinnati Public Schools, Toledo Public Schools and Dayton Public Schools; facilitated and mediated school construction claims state-wide.</p>

	<p>Heather A. Bartzi</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5728 t Heather.Bartzi@AboutPMC.com</p>
<p>Summary</p>	<p>Ms. Heather Stakich focuses her practice on representing owners, developers, contractors, architects and other construction professionals in all aspects of construction and development projects. As a transactional attorney, a significant portion of her work involves counseling clients preparing and reviewing construction documents, negotiating construction and design professional agreements and project management counseling for a wide variety of public and private projects, including sports facilities, power plants, government buildings, museums, mixed-use developments, regional shopping malls and offices. Ms. Stakich also has experience in several aspects of commercial real estate, including the acquisition and sale of real estate, financing, leasing and other general real estate matters. Ms. Stakich is a member of the American Bar Association, the Ohio State Bar Association and the Cleveland Metropolitan Bar Association.</p>
<p>Education</p>	<p>Case Western Reserve University School of Law; J.D.; <i>cum laude</i> Cornell University; B.A.; 1998; with distinction</p>
<p>Proposed Project Role</p>	<p>Project Delivery/Legal RFQ and RFP Preparation</p>
<p>Prior Experience on Similar Projects</p>	<p>Contract preparation and negotiation on multiple owners representative projects; prepared multiple RFP & RFQ documents for PMC owner's representative projects</p>


	<p>Julie Criscione</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5875 t Julie.Criscione@AboutPMC.com</p>
<p>Summary</p>	<p>Julie Criscione has a diverse range of experience in both private and public sector work. Her role as Owner's Representative involves total project budget development, project implementation and process planning. She facilitates decisions between the Client and design team during the design phase and ensures that the process remains on track. Julie's hands-on knowledge of preconstruction and construction phase services make her well suited to develop scenarios for future implementation reflecting all associated project costs.</p> <p>Julie has had considerable experience with monitoring budget expenditures and tracking project schedules, which requires close interaction with the construction team and familiarity with onsite issues and work progress. As part of her scope of work, Julie compiles and communicates this information to the Owner through the development of cost and observation reports. This reporting process has also been successfully utilized to assist banks and lenders with required loan documentation.</p>
<p>Education</p>	<p>Ohio State University, Bachelor of Science Degree in Industrial Design</p>
<p>Proposed Project Role</p>	<p>GMP Facilitation</p>
<p>Prior Experience on Similar Projects</p>	<p>Cleveland Hearing & Speech Center; Museum of Contemporary Art Cleveland, Cleveland Science Center, Kansas City Royals, The A.M. McGregor Home</p>

Statement of Qualifications for Owner's Representative Services


	<p>Eric Gonczy</p> <p>Project Management Consultants LLC 3900 Key Tower, 127 Public Square Cleveland, Ohio 44114 216.566.5792 t Eric.Gonczy@AboutPMC.com</p>
<p>Summary</p>	<p>Mr. Eric Gonczy recently joined the PMC team, having previously worked for the City of Cleveland, where he assisted applicants in navigating the design review process and evaluated projects for conformance with the City's design standards. He drafted design guidelines for urban residential developments, working closely with architects and contractors to develop cohesive design plans and to coordinate project implementation. Eric was previously affiliated with architectural firms in Cleveland and Youngstown, primarily engaged on residential, commercial and institutional projects.</p>
<p>Education</p>	<p>Kent State University, Bachelor of Architecture Degree Kent State University, Bachelor of Arts Degree (Spanish/Education)</p>
<p>Proposed Project Role</p>	<p>Managing Owner Personnel GMP Facilitation</p>
<p>Prior Experience on Similar Projects</p>	<p>Warrensville YMCA, Cleveland Medical Mart & Convention Center, Thompson Hine Leasehold Improvement projects</p>

Statement of Qualifications for Owner's Representative Services

	<p>Laura Steinbrink</p> <p>HLMS Sustainability Solutions 1301 E. 9th Street, Suite 2320 Cleveland, Ohio 44114 216.452.0909 t lsteinbrink@HLMSSustainability.com</p>
<p>Summary</p>	<p>Laura Steinbrink is co-owner and principal of HLMS Sustainability Solutions, a consulting business centered at the intersection of sustainable buildings and business practices. As a leader in an ever-evolving market, HLMS help clients weave high performance building methods and sustainable business practices with their financial, operational and environmental objectives. HLMS is a minority and woman owned business located in Cleveland, Ohio.</p> <p>Laura's foray into sustainability work came as she served as the Director for Community Relations at University Hospitals, providing counsel and strategy development for a \$1.2 billion dollar building project. In her role as a sustainability consultant, Laura works with organizations large and small in the public and private sectors, ranging from the City of Cleveland to boutique real estate developers, manufacturing companies and large employers such as The Ohio Schools Facilities Commission, The Cleveland Clinic and Cuyahoga Community College. With a focus on creating value from sustainability, Laura excels in working with clients to identify the right project scope to meet their needs. Her projects include start-to-finish LEED project management, sustainable strategy development, energy reporting and metrics, training and program development.</p>
<p>Education</p>	<p>Colby College; B.A. Green Mountain College; M.B.A. Sustainable Business U.S. Green Building Council; LEED Accredited</p>
<p>Proposed Project Role</p>	<p>Sustainability Compliance Oversight</p>
<p>Prior Experience on Similar Projects</p>	<p>Facilitation of eco-charrettes for multiple OSFC school districts; Cuyahoga Community College, Cleveland Clinic; University Hospital; Westlake City Schools</p>

	<p>Margaret Hewitt</p> <p>HLMS Sustainability Solutions 1301 E. 9th Street, Suite 2320 Cleveland, Ohio 44114 216.452.0909 t mhewitt@HLMSSustainability.com</p>
<p>Summary</p>	<p>Margaret is the owner of a Sustainability Consulting firm specializing in LEED (Leadership in Energy and Environmental Design) Certification; provides project management services for business owners, architects, engineers, construction managers and contractors for the LEED certification process with the United States Green Building Council.</p> <p>Margaret is a degreed architect with more than 20 years of management and project analysis experience, including leadership roles at McCormick Place Convention Center, Chicago Public Schools, URS Corporation, Quality Project Management, Progressive Insurance, Cedarwood Development and University Hospitals Health System. Consistently meets or exceeds senior management expectations with project delivery. She is also accomplished in managing large, complex multi-site projects as an employee or consultant, with major organizations including University Hospitals Health System, Progressive Insurance, the City of Chicago and URS Corporation. Skilled as owner's representative and liaison when interacting with contractors, government agencies, community organizations, area businesses, and others affected by construction efforts. Knowledge includes program management, design, budgeting, project team selection and supervision, plan development, coordination, contracts, finance, and construction management. Managed over 1,400 new construction/renovation projects at 567 facilities and prepared/managed five-year budget exceeding \$3.5 billion.</p>
<p>Education</p>	<p>University of Illinois; B.A.</p>
<p>Proposed Project Role</p>	<p>Sustainability Compliance Oversight</p>
<p>Prior Experience on Similar Projects</p>	<p>Cincinnati Public Schools, Dayton Public Schools, Akron Public Schools, Chicago Public Schools</p>

Statement of Qualifications for Owner's Representative Services

	<p>Arlene Anderson Contract Compliance Administrator</p> <p>Minority Business Solutions, Inc. (MBS) 16400 Miles Avenue Cleveland, Ohio 44128 216.283.0707 t aanderson@minoritybiz.org</p>
<p>Summary</p>	<p>As the President/CEO, Arlene is responsible for strategic planning and administering all programs, overseeing budget and expenditures, and organizational development. She is the founder of this company and has worked to strategically increase the participation of small, minority and female owned businesses for over 15 years.</p> <p>Under Arlene's leadership, the company has provided diversity consulting services to clients with construction projects totaling over \$1.5 billion dollars. The work completed by Minority Business Solutions has been noted in white papers from Cornell University and MIT.</p>
<p>Education</p>	<p>Kent State University; Health Care Administration, Associate of Science</p>
<p>Proposed Project Role</p>	<p>Diversity Outreach, Monitoring and Reporting</p>
<p>Prior Experience on Similar Projects</p>	<p>Cuyahoga Community College, University Hospitals System, Cleveland Medical Mart and Convention Center, Horseshoe Casino Cleveland, St. Luke's Manor, Cleveland Municipal School District, Case Western Reserve University, Greater Cleveland Regional Transit Authority</p>

4. engineering studies and construction administration services •

Firm's experience in reviewing engineering studies and understanding of how engineering studies are performed, and experience with Construction Administration.

Our team has extensive experience in reviewing engineering studies on K-12 buildings. We have managed the construction of over 160 School buildings where our duties have been to review various options for building systems to determine upfront costs, life cycle costs and long term operational costs. These reviews include reviewing system type, IE Geothermal, Chiller Beams, etc. to determine the best fit for the school district.

Understanding how the data is obtained and calculated is critical. During the design stage, the engineers conduct modeling based on the systems, existing and new building make up, amount of glass in the exterior walls, occupancy loads, various room types and usage, etc. to determine heating and cooling load requirements. Based on this data, the engineers design various system options for the buildings. The studies also need to be reviewed to ensure that they meet the minimum LEED requirements in order to obtain suitability goals.

- ***It is our recommendation that we add to our team a MEP peer review consultant. We will work with the District to select the appropriate consultant to perform these services.***

Since our inception in 1994, Regency has performed Owner Agent and Construction Administration Services for over \$2 billion dollars of construction projects. In this role, our primary tasks are participating in design meetings with the project team members, review and comment on project estimates and schedules through design, perform constructability reviews of the documents. In construction, our role includes monitoring the quality of the work, monitoring the project schedule, reviewing pay applications, attend progress meetings and core team meetings, and provide updates to the Board of Education.



5. public owner consulting services •

Experience assisting Ohio public Owners with selection of and soliciting statements of qualifications and proposals from construction professionals and consultants.

Preparation of RFQ's and RFP's. The PMC and Regency team has assisted public owners throughout the state of Ohio in providing RFQs and RFPs conforming to the requirements of the Ohio Revised Code. We have written public RFQs and RFPs for the solicitation of Architects, Construction Manager at Risk, Design-Builders, Testing, Environmental, Interior Design and Food Service to name a few. Our team has provided proposal preparation services to a variety of public clients, including most recently the Lakewood Public Schools, Austintown Public Schools, Lake Local Schools, the Cleveland Heights-University Heights Library, East Cleveland Public Library, City of Warrensville, Cuyahoga County, and the Ohio Schools Facilities Commission. Our direct knowledge of Ohio Construction Reform and the changes to the Ohio Revised Code in the writing and evaluation of proposals allows us to better serve the Cleveland Heights-University Heights School District avoiding costly challenges to the project.

Management of the Process. Beyond the preparation of RFQs and RFPs, our team has extensive experience managing the process for selection. To better serve the Cleveland Heights-University Heights School District as Owner's Representative, we would be responsible to manage the overall process of selection. This work includes fielding all questions from the proposers and insuring all the proposers are notified of the answers, working with the district on identifying individuals for the selection committee, establishing matrixes for evaluating the responses, coordinating the interviews and handling all internal and external communication for the district. We pride ourselves on establishing a thorough and fair process which meets the requirements for public contracting.

Assistance in Drafting Contracts. The PMC legal team, working as consultants, have assisted many public owner's legal counsel in drafting and negotiation contracts for service providers/contractors and as part of the Thompson Hine Construction Group Practice they have been recognized as leaders in project delivery, design and construction contracting and negotiations. Jeff Appelbaum was recently recognized by *Chambers* as one of the top construction lawyer's in the United States and the number one construction lawyer in Ohio. The PMC team has assisted public owners in drafting agreements for Architects, Construction Manager at Risk, Design-Build, and a variety of specialty service providers.



6. guaranteed maximum price facilitation •

The firm's experience in facilitating a guaranteed maximum price for a construction manager at risk or design builder, particularly in schools and other public projects.

PMC has extensive experience facilitating guaranteed maximum price for a construction manager at risk or design-builder for both public and private clients. Over the last 10 years PMC has facilitated GMP's for over a billion dollars' worth of public and private construction including the Cleveland Convention Center and Medical Mart, the new Goodyear World Headquarters, Cleveland Hearing and Speech's office and lab building, City of Warrensville Heights new YMCA and various projects at The Ohio State University. In the fall of 2010 the PMC team facilitated the first public school project in the state of Ohio to use a GMP. Working with the Lake Local School District that had an urgent need due to the destruction of their High School by a tornado, PMC was able to set up a pilot project using Design-Build. Also, since this was an insurance claim having a facilitated GMP, it allowed the district to settle the claim using an actual value eliminating the settlement risk to the district. The Lake Local School project became the model for GMP Design-Build for Ohio Construction Reform allowing the Cleveland Heights- University Heights School District the opportunity to use these new project delivery models.

Our partner, Regency Construction Services, has direct experience holding GMP contracts for such diverse clients as St. Vincent Medical Center, St John's Medical Center, Case Western Reserve, and on four Charter Schools for Breakthrough Schools in Cleveland. Having this direct experience of holding a GMP contract gives our team vital direct knowledge of the areas of concern from the construction manager at risk or design-builder perspective.

Unfortunately, one of the principal problems inherent to the GMP establishment is the uncertainty of the scope of work upon which the GMP is based. By definition, the GMP is based upon incomplete documents. When the final construction documents are released months after the GMP is established, disputes typically arise as to new details which appear in the final document set. It is not uncommon for the construction manager or design-builder to argue that a particular new detail constitutes "new scope" which was not indicated in any phase of the GMP documents and which, therefore, constitutes the basis for a change order requiring the payment of additional compensation and/or the granting of a time extension.

Long experience has demonstrated that this issue cannot be properly resolved merely by the insertion of contractual language that purports to shift risk, as such an effort only leads to the creation of real or hidden contingencies that drive up project cost. This problem can be effectively addressed, however, by implementation of a good process and, in particular, by use of the "facilitated GMP" or "prose" process that was introduced to the industry by Jeff Appelbaum of Project Management Consultants in the late 1980s.







Statement of Qualifications for Owner's Representative Services



The following is a step-by-step summary of Project Management Consultants' facilitated GMP process that we could incorporate for the Cleveland Heights-University Heights School District.

- Step 1: At the outset of the project PMC will bring the owner, A/E team and construction manager or design-builder together to facilitate agreement on the intended structure and content of the set of documents upon which the GMP is ultimately to be based (the "GMP Set").
- Step 2: The parties engage in a normal cost review/reconciliation process up until the date of submission of the GMP Set of documents.
- Step 3: The A/E delivers the complete GMP Set, together with the "prose statement." The prose statement is a detailed listing developed by the A/E team of all incomplete design elements contained in the GMP Set and the A/E team's statement of intended scope with respect to such incomplete elements (including identification of all "quantities and qualities" that will ultimately appear in the Construction Documents).
- Step 4: Within 30 days after delivery of the GMP Set and prose statement, the construction manager submits its proposed GMP, including qualifications and assumptions which are based upon the GMP Set and specific statements contained within the prose statement.
- Step 5: Within days after receipt of the proposed GMP, the owner, A/E team, and construction manager or design-builder meet to reconcile any discrepancies or disagreements relating to the GMP Set, prose statement, the proposed GMP and qualifications and assumptions. This reconciliation is performed during an extended, structured facilitated session by PMC pursuant to which the parties come to agreement as to statements contained in the prose statement and the construction manager's qualifications and assumptions. Agreements reached during this session are documented, and the prose statement and qualifications and assumptions are modified accordingly.
- Step 6: Based upon the final prose statement and the revised qualifications and assumptions, the construction manager or design-builder submits its final GMP to the owner for approval.
- Step 7: Within two weeks, agreement is reached upon the final GMP, prose statement and qualifications and assumptions. Those documents are typically incorporated into an amendment to the construction manager or design-builder agreement that memorializes the GMP.

The impact of PMC's facilitated GMP process is to enhance project definition and greatly reduce later misunderstandings, disputes and disagreements as to what is included within the GMP. We understand that there will be an education process that accompanies the implementation of these facilitated sessions.

7. ohio K-12 experience

	<p>Regency Construction Services, Inc. Lakewood City School District District-wide Capital Improvements New Garfield Middle School & Stadium Renovations to Lakewood High School Renovations to Horace Mann School Renovations to Emerson School Renovations to Grant, Lincoln and Roosevelt Schools New Harrison Elementary School New Hayes Elementary School New Harding Middle School</p>
<p>c.) Contacts School District: Dr. Joseph Madak Superintendent of Schools Phone: 216.529.4092</p> <p>Architect: Mr. Dana Mitchell URS/GPD Phone: 414.434.1368</p> <p>OSFC(ELPP): Mr. Richard Hickman Executive Director Phone: 614.466.6290</p>	<p>a.) Project Description & Services</p> <p>Regency has provided Agency CM Services along with an Associate Construction Management Firm, and has completed Phases 1 and 11 of a Three-Phased Master Plan. To date approximately \$195 million and 700,000 square feet of new and renovated projects are complete. Phase 1 included two new Elementary and two new Middle Schools. Phase 11 converted two existing Junior High buildings to Elementary Schools and a significant (185,000 sf) renovation to the High School.</p> <p>b.) Project Start & Completion Dates 2005 - 2010</p>
	

	<p>Project Management Consultants LLC</p> <p>Lake Local School District New High School</p> <p>Design Build Project</p>
<p>c.) Contacts</p> <p>SCHOOL DISTRICT: DR. JIM WITT SUPERINTENDENT OF SCHOOLS PHONE: 419.661.6690</p> <p>DESIGN BUILDER: BRAD DEAL RUDOLPH LIBBY PHONE: 419.725.3123</p> <p>ARCHITECT: THE COLLABORATIVE PHONE: 419.242.7405</p>	<p>a.) Project Description & Services</p> <p>The Lake Local School District had an urgent need due to the destruction of their High School by a tornado and temporary facility time constraints imposed by their insurer. PMC, as Owner's Representative, worked closely with the District and their design team to set up a pilot project using a Design-Build project delivery system, starting design in the Fall 2010, to deliver a completed 140,000 SF High School by July 2012. The criteria design architect was able to meet the district's programming needs with PMC facilitating meetings and discussions regarding work scope priorities and systems selections. Bidding documents were developed quickly to allow solicitations for initial pricing that provided critical cost data used to evaluate the design build teams as well as validate the budget. PMC also worked closely with the team to coordinate owner provided items in the design documents. PMC worked with team on the facilitated GMP process, which allowed work to start in April 2011. Since this project was funded primarily by an insurance claim, having a facilitated GMP also allowed the district to avoid a protracted settlement dispute with their carrier.</p> <p>b.) Project Start & Completion Dates November 2010 - July 2012</p>
	



Regency Construction Services, Inc.

Fairview Park City Schools

Renovations to Middle School/High School
New Elementary School

c.) Contacts

SCHOOL DISTRICT:
MR. BRION DEITSCH
SUPERINTENDENT OF
SCHOOLS
PHONE: 440.331.5500

ARCHITECT:
SYED ABBAS
ARCHITECTURAL VISION
GROUP
PHONE: 440.808.8520

a.) Project Description & Services

Regency provided Design Phase and Construction Phase Management Services on this \$29 million district-wide construction program. The flagship portion of this capital program was a new 102,000 square foot Elementary School to house grades K-5. It also included extensive renovations and additions to the 189,900 square foot combination high school/middle school. A major component of the high school program was the conversion of an indoor pool space to additional gymnasium space.

b.) Project Start & Completion Dates

May 2006 – August 2007



Statement of Qualifications for Owner's Representative Services



Regency Construction Services, Inc.

Aurora City School District
High School Addition/Renovation
District-wide Improvements

c.) Contacts

SCHOOL DISTRICT:
MR. RUSS BENNETT
SUPERINTENDENT
PHONE: 330.562.6106

MR. WILLIAM VOLOSIN
TREASURER
PHONE: 330.562.6106

ARCHITECT:
FANNING HOWEY
PHONE: 412.434.1368

a.) Project Description & Services

Regency provided Owner's Representation services for the \$2.6 million Aurora High School addition and renovations that included new art, science and academic classrooms. Regency also oversaw construction of the first phase of the campus master site plan that provided new driveways connecting the high school and middle school and replaced the grandstands at the stadium.


The Aurora School District encompasses all of Aurora and a portion of Reminderville. With a current enrollment of nearly 3,900 students, the District includes five buildings, four of which are in a campus setting.

b.) Project Start & Completion Dates

March 2009 – August 2010



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	<p>Regency Construction Services, Inc.</p> <p>Breakthrough Charter Schools Capital Improves to Multiple Charter Schools</p> <p>Construction Management at Risk and Design/Build Projects</p>
<p>c.) Contacts</p> <p>SCHOOL DISTRICT: JILL ZELDEN CHIEF OPERATING OFFICER PHONE: 216.456.2086 EXT. 1301</p>	<p>a.) Project Description & Services</p> <p>Breakthrough Charter Schools is a nationally recognized network of free, public, high-performing charter schools that was formed in 2010 by three of the highest-performing, non-selective, college preparatory, urban public charter schools in Cleveland -- Citizens Academy, E Prep, and The Intergenerational School. Regency Construction has provided construction management services to Breakthrough Schools on 4 of its schools.</p> <p>b.) Project Start & Completion Dates January 2012 - Present</p>



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	<p>Project Management Consultants LLC</p> <p>Port Clinton City Schools District-wide Capital Improvement Program</p>
<p>c.) Contacts</p> <p>SCHOOL DISTRICT: PAT ADKINS SUPERINTENDENT OF SCHOOLS PHONE: 419.732.2102</p> <p>ARCHITECT: ROD WIFORD FANNING HOWEY PHONE: 419.586.7771</p>	<p>a.) Project Description & Services</p> <p>Owner's Representative work with the district and architect to develop master plan for district. Master planning process including analysis of functionality of existing spaces for renovations versus replacement for Catawba (1913), Portage (1921), Jefferson (1950), Bataan (1957), and Port Clinton High (1963, 1991) buildings and development of budget, schedule and phasing for project to meet community needs and expectations. Assisted the district with coordinating a bond committee and focus groups for community input on Master Plan.</p> <p>b.) Project Start & Completion Dates Spring 2005 – Fall 2006</p>
	

	<p>Project Management Consultants LLC</p> <p>Cleveland Convention Center and Global Center for Health Innovation New Construction</p> <p>Design Build/Construction Manager @ Risk Project</p>
<p>c.) Contacts</p> <p>OWNER/CUYAHOGA COUNTY: BONNIE TEEUWEN PHONE: 216.698.2058</p> <p>DEVELOPER: LLOYD DAVIDSON MMPI PHONE: 216.920.1441 312.527.6496</p> <p>CRITERIA ARCHITECT: CHRIS ESEMAN LMN ARCHITECTS PHONE: 202.682.3460</p> <p>DESIGN BUILDER: MARK DENT TURNER CONSTRUCTION PHONE: 216.522.1180</p>	<p>a.) Project Description & Services</p> <p>The new \$465 million Cuyahoga County Cleveland Convention Center and Global Center for Health Innovation was designed by LMN Architects in conjunction with URS as the Architect of Record. The developer and recent operator was MMPI Cleveland Development LLC, and the Design/Builder was Turner Construction Company.</p> <p>PMC's role on the project provided Owner's Representative services for day-to-day project management; conceptualization and implementation of the project delivery system; advised on risk management and insurance program; and served as legal consultant. PMC was also responsible for preparation and negotiation of the bridging consulting agreement and the design build agreement with design builder; partnering facilitation services were also provided.</p> <p>b.) Project Start & Completion Dates January 2010 – Summer 2013</p>





Project Management Consultants LLC

City of Warrensville Heights YMCA
New City Recreational Facility

Construction Manager @ Risk Project

c.) Contacts

**OWNER/CITY OF
WARRENSVILLE HEIGHTS:
MAYOR BRAD SELLERS
PHONE: 216.857.1171**

**ARCHITECT:
LESTER CUMBERLANDER
MOODY NOLAN
PHONE: 216.432.0696**

**CONSTRUCTION MANAGER
CHARLIE IZZO
INFINITY CONSTRUCTION
PHONE: 216.663.3777**

a.) Project Description & Services

PMC provided Owner's Representation services for a new \$11.7 million recreation center for the City of Warrensville Heights. The new 41,000 square foot facility, which is operated by the Greater Cleveland YMCA, includes a gymnasium, pool, fitness area, Teen Center and community meeting room. PMC also prepared design parameters as part of Planned Unit Development legislation for the new Town Center development, to coordinate the design and placement of the recreation center with the adjacent Cuyahoga County Public Library branch that was designed and built concurrently with the project.

b.) Project Start & Completion Dates

January 2010 – June 2012



8. OFCC experience

Demonstrate the firm's experience with Ohio School Facilities Commission Programs, including the Expedited Local Partnership Program, Classroom Facilities Assistance Program and familiarity with the Commission's Design Manual.

Project Management Consultants and Regency Construction Services have significant experience with the Ohio School Facilities Commission and our number one goal is to use this experience to **maximize the dollars** the state will provide for the Cleveland Heights-University Heights School District's Facilities Project. Both organizations have worked with the Commission since its inception including providing consulting and facilitation services to the Commission for the establishment of the policies and processes of all their programs. We have an intimate knowledge of the inner workings of the OSFC programs and over the years we have developed great working relationships with the staff of the Commission. Because of our knowledge and working relationship with the Commission, the PMC team is presently facilitating the integration of the Ohio School Facilities Commission with the State Architects Office into the Ohio Facilities Construction Commission. Having direct knowledge of this new Commission which will be officially established this September, will allow our team to better serve the Cleveland Heights-University Heights School District in its dealings with the state.

PMC Experience. Since 1999, Project Management Consultants has provided neutral partnering and facilitation service for hundreds of Ohio school districts participating in both the ELPP and CFAP programs. We have helped districts navigate these state programs. We have resolved hundreds of issues including interpretation differences between a District and the OSFC with the OSDM Manual and we have facilitated the resolution of co-funding issues between school districts and the state. The PMC team launched and implemented the first pilot Design-Build K-12 project co-funded by the OSFC and a school district. The Lake Local School District's High School was destroyed by a tornado and had an urgent need for a new High School. PMC showed the OSFC and the District how, with the use of design-build, nine months could be taken off the schedule. The state and district took this bold step and the project became a pilot for Ohio Construction Reform. PMC was hired as Owner's Representative for the project and facilitated the GMP amendment.



Regency Construction Services Experience. To date, Regency has managed construction of 140 new and/or renovated buildings for 50 OSFC co-funded district-wide programs. In addition to Regency's construction management experience, they have led the assessment and master planning process for over 200 school districts statewide. In both processes they have prepared well over 500 individual school estimates, conducted thousands of Ohio School Design Manual reviews and validations and have prepared and monitored hundreds of school design and construction schedules. Regency has been a contributor to the development of the Ohio Schools Design Manual and was instrumental in the development of a number of the review and validation documents.

Regency Construction has supported the mission of the Ohio School Facilities Commission since its inception in 1997. They have supported the mission of the OSFC through their leadership role in the Emergency Repair Program and as one of the four state-wide team leaders of the Regional Program Consultant program that manages district-wide facility assessments and master planning processes, to managing over \$2 billion of new and renovated school construction as Construction Manager.

Regency Construction has been working as a program consultant for the Expedited Local Partnership Program (ELPP) which is designed to give districts not yet participating in the Classroom Facilities Assistance Program the opportunity to move ahead with portions of their project. The program allows school districts to pass a resolution requesting to enter the ELPP. OSFC then performs an assessment of the district's facilities and enters into an agreement with the district on a Facility Master Plan that covers the entire needs of the district.

Specific to the Emergency Repair Program, Regency managed over 100 school district programs that received \$500,000 budgets to address pressing emergency physical needs. Regency has assisted over 200 school districts and all 48 Career Tech Facilities through the master planning and assessment process. All totaled, Regency has prepared thousands of master plan options and has performed over 2,500 Ohio School Design Manual reviews. Specific to their Construction Management experience, they have completed over 13,000,000 square feet of new and renovated school space in 150 facilities. Regency brings extensive experience on pre-WWII school buildings having recently completed the modifications to vintage facilities for Lakewood City School District, Fairview Park City Schools and Shaker Heights School District.

Humanities Loom Experience. A key element of the OSFC program is sustainability and the requirement of attaining LEED Silver for all projects in ELPP and CFAP districts. Working with PMC, Humanities Loom has set up neutral facilitated Eco Charrettes for OSFC co-funded projects. They have helped school districts determine what is important for their district in the areas of sustainability and energy use.



Experience with Community Learning Centers



Fairview Park Library



Lorain County Community College



Magnificat High School Surround Learning



Lorain County Community College



MetroHealth Middleburg Heights



Solon Public Library



Western Reserve Historical Society

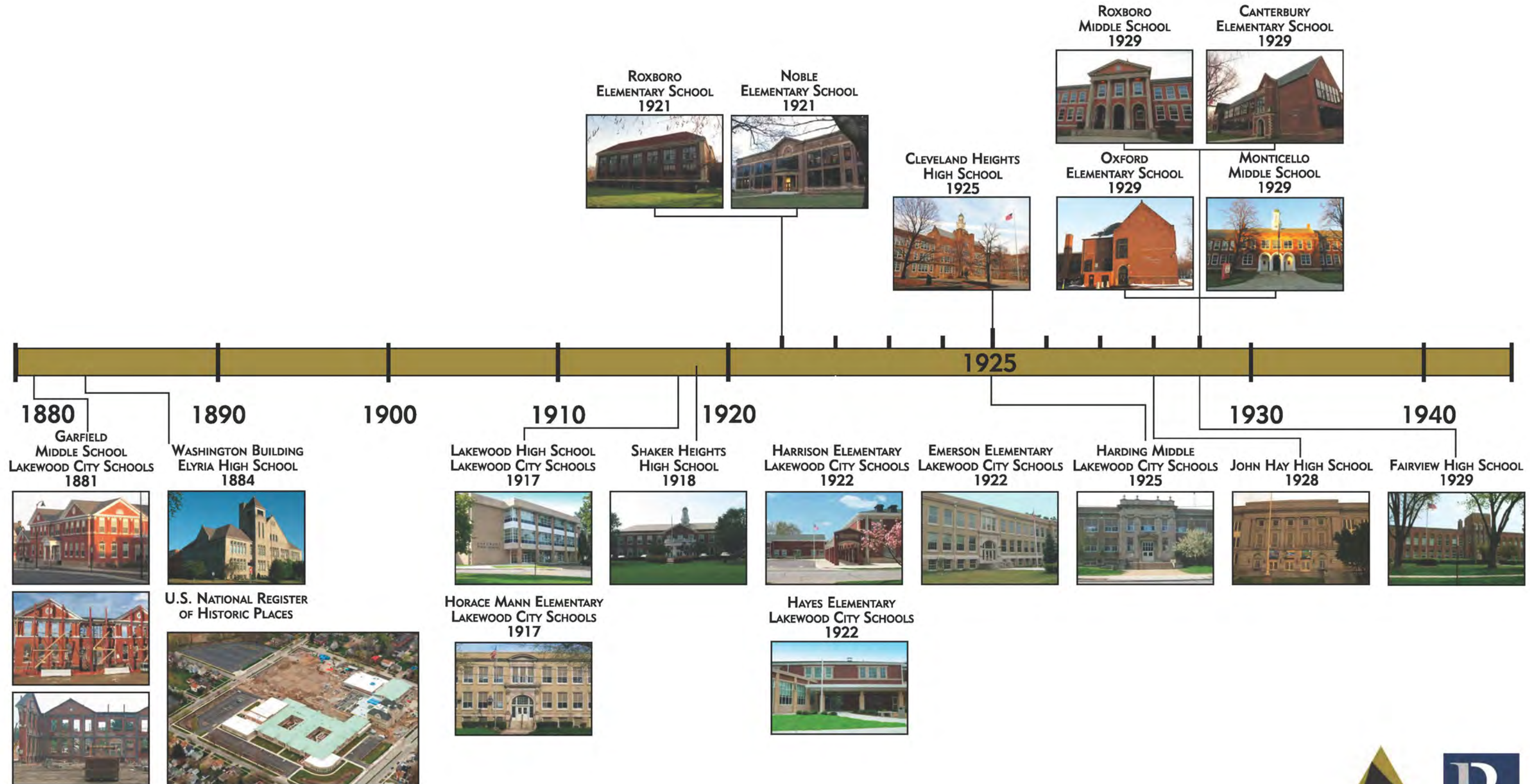


Elyria High School Media Center



Cleveland State University

Experience with Pre-WWII Buildings



10. facilities and equipment

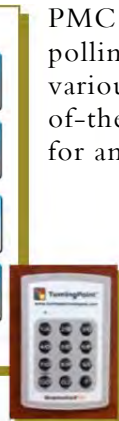
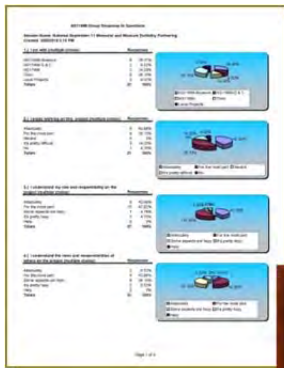
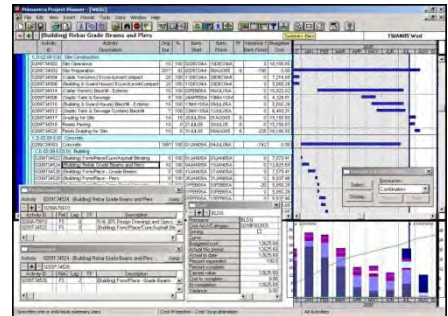
The firm's equipment and facilities and location, availability and accessibility of facilities and equipment to support activities on the project.

Facilities. Although both PMC and Regency Construction Services have significant facilities based in downtown Cleveland and Lakewood, Ohio. It is our recommendation to set up an office in the district. The role of owner's representative is to be an extension of the Cleveland Heights-University Heights administrative staff and for our key staff to work efficiently, they need to be located in the district. We envision locating our key staff with administrative support in an office that will become the hub of the project. In addition to traditional offices, we would like to include a variety of conference spaces so all project meetings can be held at this location so as not to burden the district's existing facilities. Some possible options are renting space in the Coventry School or a modular office facility adjacent to the Board of Education Building or some other location in the district. We believe the rental cost of a modular office may be very low since we could make it part of the rental package for Monticello. These are just some thoughts; obviously we would like to get the district's input on the location and size of this office. For times it may be necessary to have a meeting at a neutral site, PMC has available a variety of meeting rooms that can accommodate from 20 to 100 people but we believe setting up an owner's representative/project office in the district will better serve the needs of Cleveland Heights-University Heights School Facilities Project.

Equipment. Regency brings the strength of 40 professionals to the assignment from their headquarters in Lakewood. They bring all programs to successfully produce and validate estimates, schedules and the quality of design documents.

Regency utilizes Oracle Scheduling software, AutoDesk QTO estimating software and NavisWorks by AutoDesk to aid in constructability reviews and BIM clash detection.

To aid in document sharing the PMC team will establish an FTP site where all team members, consultants, designers and contractors can access project specific documents.



PMC is a leader in the use of electronic polling, which we have used in the past for large group facilitations for various projects. At no additional charge to our clients, we offer "state-of-the-art" polling equipment with a capacity for up to 250 participants for any given session.

11. scheduling

Describe how the firm will manage the Owner's schedule for the Project.

Regency will prepare a consolidated schedule of all program related "major" components, including major CHUH tasks, consultant tasks, design phases, construction phases, etc. In addition, Regency will develop and manage a master cash flow/planned expenditure chart for the entire program.

After being initiated into the project, one of the first meetings Regency conducts is with the owner's project staff and design professionals to establish the detailed design phase schedule. This schedule addresses such issues as department programming meetings, major client meetings and approvals, milestones for document(s) completion, estimate preparations, and agency reviews and approvals. Regency takes a very proactive approach to developing this schedule. All key project team members will be invited to add input to the schedule. The schedule development work session is a TEAM forum for sharing ideas and information.



Our proven methods of obtaining schedule information from contractors result in clear, concise, and accurate control documents. Regency uses Primavera (Oracle) SureTrack, Project Manager 3.0 P6 and P7, as our scheduling software tools. We regularly establish major control schedules, executive summary schedules, and cash flow projections for each project. Our systems allow us to combine ALL project phases for the development of the overall master cash flow chart.

Regency also advocates that all activities in the project schedule be cost-loaded and integrated to the contractors' schedule of values. Contractors are paid based on documented and verifiable job progress. The cost loading of schedules results in accurate cash flow projections that aid the owner's fiscal planning.

Construction Phase Scheduling

All aspects of the construction phase will be planned and developed in Critical Path Method format. Regency approaches the construction phase with the same team perspective that is used during the design phase activities. We will work with the CM at Risk and review their construction schedule for accuracy and integration with the owner's tasks and timeframes, meet with each successful contractor and establish a detailed schedule of events of their work.



We will work with the CM at Risk in encouraging their contractors to participate in the development of the project

Statement of Qualifications for Owner's Representative Services

master schedule. When trade contractors establish ownership of the control schedule, the result, is they strive to comply with the adopted plan.

Regency has worked with the successful contractors, both local and national Construction Managers at Risk to develop the working construction phase schedules. This schedule is even more detailed and will be the document used to monitor and control construction progress. We also integrate contractor time and cost data to produce a project cash flow projection. During construction, Regency monitors the project schedule to ensure compliance and we actively work with the contractor CM at Risk to establish a recovery plan should the project deviate from its original schedule.

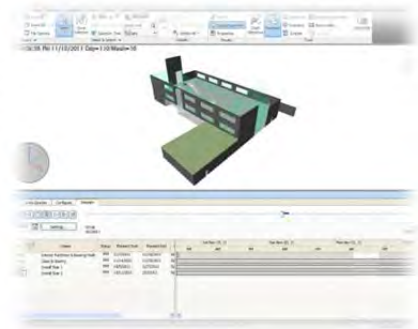


12. building information modeling •

The firm's ability to evaluate programs related to building information modeling software and provide Owner with an overview of BIM.

Today's Constructability Reviews transcend the previous concept of reviewing drawings and specifications to find errors, inconsistencies or gaps in design. Through the use of Building Information Modeling (BIM) we now have the tools to predict where conflicts and problems will occur and to come up with solutions well before the start of construction. Regency Construction Services has been a leader in the use of BIM in the constructability review process. Those items remain important to the overall process but at Regency we believe there are many additional components that add to the process.

Added to the baseline constructability review process of the past we now include discussions of how the Master Planning, budget development, material selection, LEED concepts, selection of a building site and other project items play into the constructability process. Specific to the Master Planning process, we now focus more on site selection (from a cost, space utilization and practicality, etc.), building positioning on site (from a LEED, ability to build, soils conditions, etc.) and the use and/or proximity of existing facilities. We now extend the conversations regarding the Phase One environmental and advance soils investigations as part of our early constructability approach. Each item of the LEED checklist is analyzed during the Eco-Charrette regarding constructability concepts.



Our team performing constructability reviews consist of leaders of our Construction Management Division, Bid Contract Division, Estimating Department and our scheduling team. All totaled, approximately six to eight team members will participate on any significant project.

Specific to the review of design documents later in the program development process, we believe the constructability review provides a “second set of eyes” to examine and analyze the documents from a perspective that is different from that of the design team. The goal is to determine if the project is “biddable” and “buildable” and to determine if the construction drawings and specifications are adequate for the contractors to prepare accurate bids that represent the information contained in the documents with the objective of minimizing changes in work downstream.

Our experience shows that even in today's technologically advanced process of developing documents, our team continues to find multiple issues (housekeeping, coordination, gaps, etc.) per drawing sheet. On average, our team finds between five and seven such items per sheet. With the average project today containing 150 to 200 sheets of drawing and hundreds of specification pages the number of potential “catches” is significant.

Statement of Qualifications for Owner's Representative Services

While reviewing the drawings and specifications for coordination issues we also take into consideration the completeness of the documents; anything that is vague or unclear that could adversely affect the bid results or lead to higher changes downstream. Our review includes cross-check among the various mechanical, electrical, structural and architectural disciplines.

Similar to the Advanced Estimating program we acquired to aid in improving our estimating accuracy, Regency acquired NavisWorks some time ago to enhance our constructability and design documents review process. NavisWorks enable us to review documents generated in Revit CAD (BIM) design platform from the inside out. The program's clash detection portion permits us to evaluate the design components in a three dimensional perspective. The program also provides an interconnection between the project schedule and the design.



13. sustainability

Describe the team's experience related to sustainability initiatives.

HLMS Sustainability Solutions is a sustainability consulting firm, bringing its expertise to the PMC team specifically to support Cleveland Heights-University Heights in maximizing its investment in LEED certification as a requirement in the ELPP program. HLMS is best known for its LEED project management services, which support the owner in setting and achieving sustainability goals by leveraging the LEED certification process as a tool for planning and design.

When the owner is clear about its sustainability expectations and goals, design teams are likely to produce more sustainable buildings within budget. As part of its LEED project management services, HLMS will support the CHUH District in setting its sustainability goals so it can give strong guidance to the design and construction team. In doing so, HLMS will translate the LEED rating system for district leadership so that it can make informed decisions that link district strategy with certification points. Never losing focus on the fact that schools exist to provide an education for children, HLMS weaves concepts of 21st century learning throughout the sustainability goal setting process. For example, one conversation HLMS will facilitate with CHUH is using the schools as teaching tools – before, during and after construction. Supporting the district in recognizing how to use the school as a teaching tool has direct linkage to the LEED rating system, but more importantly creates a real-world example for learning application.

Because of its focus on supporting owners in making informed decisions at the intersection of business and building, HLMS has several tools it provides to the entire team as part of its process. One tool is the LEED Cost Matrix. The LEED Cost Matrix uses life-cycle cost analysis, which looks at the long-term impact of first-cost decisions, as a tool for design decision making. This cost matrix will enable the CHUH district to understand where potential costs arise related to the LEED certification, or to achieving sustainable goals. This cost analysis will break down individual design decisions to show impact for energy and water savings as well as positive impact for other sustainability measures, such as local economic benefit or using recycled content material. The matrix positions those costs in terms of added benefit through operational savings, increased educational opportunity and other decision criteria important to CHUH.

The entire team, inclusive of the district itself, design and engineering team and construction team, will provide information and calculations to confirm compliance with the LEED rating system. To facilitate the team in being effective, HLMS will support each team member in understanding the specific requirements and completing required documentation. One tool that facilitates team coordination is the Responsibility Matrix, which shows exactly what each LEED credit or prerequisite requires from a compliance and documentation standpoint, and who is responsible for completing it.

HLMS with PMC has been working with school districts across Ohio as it facilitates Eco-Charrettes, which are part of the OFCC neutral facilitation process. Eco-Charrettes are one-day design meetings where teams apply the owner's sustainability goals to project designs and create

project-specific LEED certification plans. Additionally, HLMS supports a number of Construction Managers in the Northeast Ohio area in completing the documentation required for LEED certification. In addition to their work with schools, HLMS has also supported commercial, higher education, healthcare and housing organizations to set and meet their sustainability goals and achieve LEED certification.

The most important and unique aspect of the team's approach is to support the Cleveland Heights-University Heights School District with respect to operational practices. Inherent in supporting the District in stating its sustainability goals during design, is the recognition that operational practices and procedures may require modification during occupancy. A sustainable building requires different approaches, and HLMS with PMC and Regency we are positioned to support CHUH in maximizing its investment in sustainable design and construction by supporting district leadership in implementing sustainable operations. As a sustainability consulting firm, Our Team has experience working with districts, higher education and commercial clients in developing meaningful sustainable operations practices.

By integrating LEED project management and sustainability consulting in the owner's representative services, the PMC team will position CHUH to truly leverage the investment it will make in LEED Certification by creating space to articulate goals and evolve District practices.

Current LEED Project Management Client List:

The Cleveland Clinic
Case Western Reserve University Tinkham Veale University Center
NAI Daus, 7012 Euclid Avenue Historic Renovation
Garfield Heights School District (through P|C|S Construction)
Cleveland Metropolitan School District (through John G. Johnson Company)
Kent State University Twinsburg Regional Campus (through Snavely Group)

Other K-12 Schools:

Kenton School District
Lorain City Schools
Shelby School District
Willard School District

Other LEED Projects:

Old Dominion Freight Lines LEED-NC Cross Dock
Famicos Foundation LEED-Homes
IMG Center LEED EBOM Certification
Bellwether Real Estate Capital LEED-CI
Kadish Hinkel Law Firm LEED-CI
Tri-C Health & Technology Center LEED-NC
Cuyahoga Metropolitan Housing Authority Headquarters, LEED-NC
NASA Warehouse #B, LEED-NC
Harper's Ferry Department of Homeland Security Leadership Academy, LEED-NC





Statement of Qualifications for Owner’s Representative Services

Our Regency team member’s clients are increasingly embarking on their facility projects with a commitment to Sustainable/Green Design and Construction. The project team works closely with our client and design partners from the earliest stages of a project to assist in this endeavor, attending eco-charrettes, calculating the costs of building green and helping to maximize points for LEED certification. During construction, Regency field professionals make every effort in our regular on site practices to comply with standard operating procedures for conservation and sustainability.

Regency was responsible for managing the construction of the State of **Ohio’s first GOLD Certified PK-12 school facility** and numerous Silver Certified and Certified projects. Recently, Regency provided Owner support services on a new classroom building for Lorain County Community College where the project earned a Platinum Certification and incorporated items such as Rain Gardens, Green Roofs, Pervious Pavement, Bio-Swales, sustainable building products and energy efficient MEP systems. **Regency recently managed the installation of two of the Greater Cleveland’s largest geothermal well fields.**

Regency’s list of LEED Certified Projects:

Client	Project	LEED Certification Level
Buckeye Central School District	New PK-12 School	Gold (First Gold PK-12 school facility in the state)
Elyria City School District	New High School	Silver
Lakewood City Schools	District Wide Program	Silver
Genoa Local School District	Middle/High School	Gold
Springfield Local Schools	New 7-12 School	Silver (pending)
Sheffield Village Schools	New 7-12 School	Silver (pending)
Lorain County Community College	Library Resource Center	Silver

Education Innovation Experience



Cleveland Center for Arts and Technology



Cleveland Center for Arts and Technology



Magnificat High School Surround Learning



Lorain County Community College



Knox County Career Center



Knox County Career Center



Elyria High School Performing Arts Center



Tri-C Center for Nursing and Allied Health



Miami University College of Applied Engineering

15. EDGE participation

Our team has had great success with creating meaningful participation of MBE, FBE and EDGE firms on projects throughout the State of Ohio. Some of our project successes of inclusion includes The Cleveland Convention Center and Global Center for Health Innovation, University Hospitals and the Cleveland Municipal School District all of which exceeded a 20% participation goal.

As a former EDGE firm, our team member Regency Construction Services understands the program's importance, goals and objectives, and more importantly its mission – *to encourage, nurture, and support the growth of economically and socially underutilized businesses to foster their development and increase the number of qualified competitors in the marketplace.* Over the Regency has championed many firms and have established long standing relationships with some and can boast a record of meeting or exceeding the goals and objectives of the program on all projects we lead. **Our partner assisting us for the CHUH Owner's Representative Services EDGE portion of the project will be Minority Business Solutions.**

It is one thing to say that all EDGE goals and objectives will be met but it's another to bring that statement to reality. Our team not only brings the passion and the first hand understanding of the EDGE program but we bring a sound plan and an organized building block and verification process that works to achieve those objectives including:

- **Establish the project's EDGE program** – confirm commitment, initiate the program with all team members, and track the program for compliance and reporting.
- **Bringing together Majority Contractors and EDGE Firms by Holding Match-Maker Events** - Regency will recommend that the CM conducts a Match Maker session on site where the Subcontracting firms and EDGE firms come together to learn about the project and each other. Information typically provided includes project scope, project bid packages, timeline, and other project requirements such as EDGE certification, drug free workplace, OSHA, etc. These sessions are also an opportunity to for first and second tier subcontractors to meet and begin a dialogue about project opportunities relative to specific bid packages. The timing of these events should be the early stages of design development to allow for proper teaming opportunities.

EDGE Program Overview

As its name suggests, the State of Ohio's EDGE program promotes EDGE to small businesses by Encouraging Diversity, Growth and Equity in public contracting. EDGE is an assistance program for economically and socially disadvantaged businesses enterprise.

The State of Ohio developed the program because it is committed to maintain all state contracts, services, benefits and opportunities available without discrimination on the basis of race, color, religion, sex, national origin, disability, age, or ancestry.

Benefits of EDGE certification
 Certified EDGE program participants are eligible for:
 • contract assistance
 • financial and bonding assistance
 • management and technical assistance
 • growth opportunities with minority members

The state recognizes the need to encourage, nurture and support the growth of economically and socially underutilized businesses to foster their development and increase the number of qualified competitors in the marketplace.

EDGE establishes goals for state agencies, boards and commissions in awarding contracts to certified EDGE eligible businesses. EDGE applies to procurements of supplies and services, professional services, information technology services, construction and professional design services.

EDGE eligibility
 An EDGE participant must be a small entity and economically disadvantaged business enterprise owned and controlled by U.S. citizens who are Ohio residents.

A business enterprise may qualify if it is owned by a qualified person that (1) has a net worth that is less than the net worth of an individual who is not a disadvantaged person; (2) is a disadvantaged person; or (3) is a disadvantaged person who is a disadvantaged person.

Socially disadvantaged criteria
 (Must meet one or more of these.)
 Socially disadvantaged individuals are those who have at least one relative living in a household that has significantly reduced life, business success, such as:
 • race
 • ethnic origin
 • gender
 • physical/mental disability
 • long-term residency in an environment isolated from mainstream Ohio society
 • other factors relevant to their life

Economically disadvantaged criteria
 (Must meet both criteria below)
 Economically disadvantaged persons must meet the following standards:
 • Personal net worth of each owner (based not on net worth) must not exceed \$250,000 at program entry.
 • Personal net worth of each owner must not exceed \$750,000 during program participation.

For more information or an EDGE certification application, contact:
Ohio DAS (Ohio Department of Administrative Services)
 Equal Opportunity Division
 EDGE Certification Office
 4000 Square Road
 Columbus, Ohio 43228
 614.496.8300
 www.EDGE.ohio.gov

Statement of Qualifications for Owner's Representative Services

- **One-on-one meetings with EDGE firms to determine capacity and possible scenarios for their involvement in the project.** Getting to know the interested EDGE firms is important. Both the success of the firms and the project are critical, therefore, understanding their ability to complete the scope of their work helps to achieve success on the project.
- **Establish Mentor-Protégé relationships** – providing mentorship opportunities is important to the growth and project success for EDGE firms. For this program, we would recommend establishing Mentor-Protégé relationships between the CMr and EDGE firm as well as between first and second tier subcontractors. By establishing this type of relationship, it is more likely that these firms would team on other opportunities beyond the CHUH project.
- **Conduct training for EDGE firms** – project specific training is encouraged to meet project specific requirements relative to paperwork like schedule of values, applications for payment, etc.
- **Unbundle bid packages to facilitate opportunities for EDGE firms to bid as a first tier subcontractor.** Another way to include EDGE firms is to be sure to offer stand-alone opportunities on the project where teaming arrangements are not necessary. One way to do this is to provide bid packages that these firms can be competitive and complete successfully.

Since the inception of the State of Ohio EDGE program, Regency has met or exceeded the EDGE requirements on all of our projects. Early on, the state required that 5% participation be achieved, and in recent years, the program has encouraged the participation of upwards of 15% on projects. In both scenarios, we have always met or exceeded these goals. ***These projects have included all of the construction management services we provided on our school work for on over 100 buildings.*** Some of our recent projects where we have met or exceeded EDGE requirements include, but are not limited to:

- Kent State University, Field House Expansion
- Cuyahoga Community College, Public Safety Training Center of Excellence
- Springfield Local Schools, New 7-12 School and Field House
- Lakewood City Schools, Multi-phase District-wide Improvements
- Olmsted Falls City Schools, New Intermediate Schools
- The Ohio State University, Chiller Plant
- Buckeye Central Local Schools, New PK-12 School
- Genoa Local Schools, New Elementary School

EDGE Partners: As part of our Owner's Representative Team we have engaged HLMS (*EDGE Certified*) and Minority Business Solutions (*EDGE Certification in process*) the following are summaries of each organization.



HLMS Sustainability Solutions



We are a sustainability consulting firm. Our core services enable our clients to weave high performance building methods and sustainable business practices with their business's financial, operations and environmental objectives. As a leader in an ever-evolving market, HLMS Sustainability Solutions is positioned at the intersection of sustainable building and business practices, providing expertise in consulting, product, education and certification. The client-focused counsel, services, and training we provide support sustainable change.

HLMS Sustainability Solutions is best known for its LEED project management services, which provide project teams start-to-finish support in establishing sustainability goals, designing to meet those goals, and building or renovating facilities that achieve LEED certification. LEED project management clients include the Ohio Schools Facilities Commission, Project Management Consultants, Department of Homeland Security, Breen and Company, the Cleveland Clinic and Old Dominion Freight Lines.

Because of our expertise in sustainable business strategy, HLMS Sustainability Solutions also consults with organizations on their sustainability goals and strategies, including the City of Cleveland, Radix Wire, Landmark Real Estate Management, Ozanne Construction and the W.S. Tyler Company.

Located in Cleveland, Ohio, HLMS Sustainability Solutions is minority and woman owned, and is the mid-west affiliate for Brightworks, an international sustainability consulting firm.

HLMS Sustainability Solutions

A partnership between the client, the project team and HLMS Sustainability Solutions fosters superior value for the client that extends beyond the building project. By weaving together the client's sustainability goals, the project teams' expertise and our proprietary project management systems, we provide start-to-finish support. This ensures the client's investment in first costs meets its long-term operational goals for the project.

Select Client Summaries

HLMS Sustainability Solutions creates enterprise-wide value by weaving high performance building and sustainable business expertise to meet the unique goals of our clients. The client-focused counsel, services, and training we provide support sustainable change.

IMG Center & Lincoln Building, Downtown Cleveland: This owner-leased property has achieved LEED GOLD Certification. The building has realized 30% energy savings over comparable structures, received an Energy Star designation of 91, and is saving over \$150,000 in operating costs annually. HLMS Sustainability Solutions provides comprehensive project management services including strategic consulting with respect to building policies and procedures, project management for building renovation projects, and LEED Certification.

Kadish Henkle Law Firm, Downtown, Cleveland: This law firm achieved LEED-CI Silver Certification in 2011 on its renovated space. HLMS Sustainability Solutions provided project team oversight and facilitated documentation review and submittal.

Victory Center, Midtown, Cleveland: This four-story building on the historic registry and is pursuing LEED Certification under the Core & Shell rating system. The building is anticipated to open in fall 2013, and is modeled to save over 20% in energy consumption based on system design and investment in envelope improvements.

The Cleveland Clinic Foundation: Having embraced LEED-New Construction for its new building projects, HLMS, with its affiliate, Brightworks, conducted a review of two similar projects for the purpose of uncovering best practices and identifying recommendations for future LEED Certification projects.

CMHA Headquarters, Cleveland: HLMS worked with Ozanne Construction to complete the LEED construction-phase documentation requirements for this building that achieved LEED Silver Certification in 2012.

Old Dominion Freight Lines: In response to corporate sustainability goals, ODFL opted to pursue LEED Certification for its new 60-bay cross-dock in Canton, Ohio. This facility achieved LEED Certification in 2012 and its energy model anticipated 19% energy savings and 34% water efficiency. HLMS provided LEED certification services with its affiliate, Brightworks.



Statement of Qualifications for Owner's Representative Services



HLMS Sustainability Solutions

230 West Huron Road Suite 85.53 Cleveland, OH 44113 216.452.0909 www.hlmsustainability.com

HLMS Sustainability Solutions' LEED Project Management gives to the client and the project team something they would not otherwise have: a consistent and business-oriented focus on the client's sustainability goals, integrated project facilitation, and expertise in the requirements and details of LEED. When HLMS Sustainability Solutions is part of the project team, the owner knows that their investment in sustainable practices is maximized, and the project team benefits from being released to do what they do best: design and build.

HLMS SUSTAINABILITY SOLUTIONS PROJECT SERVICES	CONSTRUCTION SCHEDULE			
	Design	Bidding	Construction	Occupancy
Client Sustainability Goal Setting	[Light Blue bar spanning all phases]			
Eco-Charette	[Light Blue, Orange, Green bars]			
Mini Charettes		[Light Blue, Orange, Green bars]		
LEED Responsibility Management System	[Light Blue bar spanning all phases]			
LEED Updates	[Light Blue bar spanning all phases]			
Grants, Incentives & Financial Analysis	[Light Blue, Orange bars]	[Orange bar]	[Orange bar]	
LEED Credit Research	[Light Blue, Green bars]			
LEED Requirements Specifications Review	[Light Blue bar]			
LEED Design Peer-Review		[Light Blue bar]		
Construction Kick-Off + LEED Tools and Support			[Light Blue, Green bars]	
LEED Construction Peer-Review				[Light Blue bar]
LEED Online + GBCI Support	[Light Blue bar spanning all phases]			
Implement Client's Sustainability Goals in Operations			[Light Blue, Orange bars]	

PROJECT MEMBER'S INVOLVEMENT THROUGHOUT CONSTRUCTION SCHEDULE

■ HLMS Sustainability Solutions
 ■ Client
 ■ Project Team: Design + Construction Agent such as Architect, GC, Constr. Manager, Energy Modeler, MEP Subcontractor, etc.

Executive Summary



“Committed to Results”

Diversity Consulting Services

EXECUTIVE SUMMARY

Mission

It is our mission to strategically increase the participation of small business. We advocate, educate, and assist minorities in business and economic development. MBS Concepts d.b.a. Minority Business Solutions, Inc. also serves as a clearinghouse to disseminate public and private resources and opportunities to minority individuals, entrepreneurs and companies.

Strategic Advantages

- **Grassroots' Community Alliance** – community awareness and outreach regarding construction and procurement related opportunities.
- **Technical Assistance** – tailored and structured technical assistance to service the construction and supply chain industry.
- **Strategic Partnerships** – takes the form of mentorship, increased opportunities, and benchmarks for excellence.
- **Virtual Team Approach** – clients will have immediate access to an experienced team who will provide professional support services.
- **Repository** - collecting, sharing and providing information and resources for business growth.

Service Descriptions

Minority Business Solutions, Inc. is a professional diversity-consulting firm headquartered in Cleveland, Ohio. We assist clients in three main areas: Diversity program design, Monitoring and compliance services, and Referral services. While each service operates as a field of its own, all are interrelated. We provide clients with a broad scope of professional and technical assistance.

- **Diversity program design:** Our company assists clients in evaluating procurement planning and inclusion processes. Our staff works closely to design and implement diversity initiatives and internal controls that improve methods by which clients process, analyze and use diversity spend information. This service involves preparation of reporting manuals, goal setting, forecasts and a community engagement plan for the clients' use.
- **Monitoring and compliance services:** We provide monitoring and compliance services to clients in both the public and private sectors and to nonprofit organizations. As part of this service, our compliance evaluations are supplemented with specific recommendations for strengthening management procedures and improving operating results.
- **Referral services:** We effectively publicize and advocate your diversity initiatives and programs to motivate your clients and contacts to make quality referrals for inclusion.

We provide unparalleled diversity services for our clients, ensuring a high standard of quality, timeliness, and accuracy. It translates our customer needs and business strategies into actionable solutions with measurable results.

In addition, MBS is dedicated to taking a proactive approach in the growth of small and minority-owned companies by providing the following services to ensure qualified and well-prepared on-going businesses.

- Basic Services
 - Guide the formation, development and expansion of minority businesses
 - Certification processing
 - Administrative services
 - Information hub
 - Referral services
 - Workshops/Seminars
 - Coordination of joint ventures or strategic partnerships

We foster an environment that supports and energizes minority-owned companies and entrepreneurs to strive for excellence.

Market Overview

The construction industry in Ohio is a consistently growing one with a projected 11.4 percent statewide increase in employment by the year 2018, surpassing the 4.3 percent overall statewide employment growth predictions. It is the only goods-producing industry expected to add jobs in total from 2008-2018, according to the Ohio Bureau of Labor Market Information. This is evident in the many construction projects planned or underway in the area, including the Cleveland Innerbelt, the Horseshoe Cleveland Casino – Phase II, Cuyahoga County Administration Building, Cuyahoga County Hotel, the Flats East Bank Development – Phase II, the Uptown/University Circle project, and extensive residential development. Owners are challenged to set, meet, and monitor minority participation objectives. In response to those challenges, Minority Business Solutions, Inc. provides the diversity program design, monitoring, and referral services that are essential in meeting those goals.

Marketing and Strategic Partnerships

Our marketing efforts are directed at major corporations and organizations as well as small business owners. We target large private and public entities who are interested in developing goal-oriented initiatives aimed at increasing minority participation. On the other end, we also focus on individuals who want to become business owners as well as current small businesses that need some technical assistance to advance their company. We build strong ties with the community we serve through strategic partnerships with organizations that have similar objectives, such as the Contractors Employers Association, National Association of Women in Construction, Urban League of Greater Cleveland, the Cleveland Branch NAACP, the City of Cleveland, and various majority and minority construction companies. This allows us to use our extensive network to aid in the knowledge, growth, and development of individuals, small businesses, and the community.

Similar Experience

MBS key staff members have extensive experience with performing such services. Projects include:

- ◆ Horseshoe Casino Cleveland – Construction Phase 1, Cost - \$350 million, 2010 – 2012
 - Conduct outreach services
 - Monitoring and reporting services

- Provide assistance to Construction Managers for inclusion
 - Provide SBE, MBE, FBE and workforce referral services
- ◆ Cleveland Medical Mart & Convention Center – New construction, Cost - \$465 million, 2010 – present
 - Conduct outreach services
 - Monitoring and reporting services
 - Provide assistance to Construction Managers for inclusion
 - Provide SBE, MBE, FBE and workforce referral services
- ◆ St. Luke’s Manor – Redevelopment projects, Cost - \$15.1 million, 2010 – 2012
 - Reporting services
 - Conduct outreach services
 - Provide assistance to Construction Managers for inclusion
 - Provide MBE, FBE and workforce referral services
 - Section 3 Compliance
- ◆ Cuyahoga Community College – Capital Construction projects, Cost - \$10 million, 2009 – present
 - Diversity program design
 - Monitoring and reporting services
 - Conduct outreach services
 - Provide assistance to Construction Managers for inclusion
 - Provide MBE, FBE and workforce referral services
- ◆ University Hospitals Systems - Vision 2010 Plan and other construction projects, Cost - \$1.2 billion, 2008-2012
 - Diversity program design
 - Monitoring and reporting services
 - Provide assistance throughout the bidding process, such as pre-bid meetings, scope reviews and progress meetings
 - Conduct outreach services
 - Provide contractor’s assistance
 - Assist in facilitating Project Labor Agreement
 - Provide MBE, FBE and workforce referral services
- ◆ Cleveland Municipal School District Masters Facilities Plan, Cost - \$335 million, 2003-2005
 - Managed monitoring contract
 - Provided MBE, FBE and workforce referral services
- ◆ Case Western Reserve University 2002 - present
 - Worked closely with Case Western Reserve University to increase minority and women business participation to over \$40 million dollars.
 - Member of Supplier Diversity Council
 - Worked closely with Case’s designee to implement policies and procedures for minority inclusion and develop strategic ways to develop relationships with small minority and women businesses

- ◆ Greater Cleveland Regional Transit Authority, 2005 - 2009
 - Member of the 11th Congressional/RTA Ad Hoc Committee
 - Worked closely with RTA designee to increase diversity outreach for the Euclid Corridor project by assisting in several matchmaker events.

- ◆ Cleveland Branch NAACP, Economic Development Chair, 2003 - 2010
 - Conducted outreach to minority contractors
 - Facilitated the NAACP Business/Contractors Coalition
 - Provided informative workshops on business development

Our management team has, collectively, over 60 years of business experience from a multitude of perspectives, such as managers, business owners, and business development consultants.

For further information, please contact:

Arlene Anderson, CCA, President/CEO
Minority Business Solutions, Inc.
16400 Miles Avenue
Cleveland, Ohio 44128

Phone: 216.283.0707

Fax: 216.283.0115

Email: aanderson@minoritybiz.org

Website: www.minoritybiz.org

16. project facilitation and partnering •

Experience with participation in or facilitation of stakeholder engagement processes that optimize the resultant facilities to meet sustainability, usability and educational goals.

Project Management Consultants (PMC), working with hundreds of school districts throughout the state of Ohio, has provided neutral partnering and facilitation services for thousands of K-12 public school building projects. PMC has been recognized as the national leader in partnering and facilitation. Over 12 years ago PMC developed a unique partnering program for K-12 public school projects which was adopted by the OSFC for all State co-funded school projects. The following is a description of the types of sessions we have provided public school districts.

Executive Partnering Session: The project team, including key owner representatives (users, administrative and executive levels), the construction management team, architects, engineers and any other key consultants, meet to discuss the project by using interactive team-building exercises that address practical project problems identified by the project stakeholders as part of pre-session discovery. Facilitation outcomes include describing and delineating team goals, identifying obstacles to and opportunities for achieving team goals and initiating action plans for specific project issues. The session also includes a project alignment exercise to clearly identify the roles and responsibilities of the team members



Sustainability Session: PMC with HLMS has been working with school districts across Ohio as it facilitates Eco-Charrettes, which are part of the OFCC neutral facilitation process. Eco-Charrettes are design meetings where teams apply the owner's sustainability goals to project designs and create project-specific LEED certification plans. Additionally, Our Team will support the Architect and Construction Manager in completing the documentation required for LEED certification. In addition to their work with schools, HLMS has also supported commercial, higher education, healthcare and housing organizations to set and meet their sustainability goals and achieve LEED certification.

The most important and unique aspect of the team's approach is to support the Cleveland Heights-University Heights School District with respect to operational practices. Inherent in supporting the District in stating its sustainability goals during design, is the recognition that operational practices and procedures may require modification during occupancy. A sustainable building requires different approaches, and HLMS with PMC and Regency we are positioned to support CHUH in maximizing its investment in sustainable design and construction by supporting district leadership in implementing sustainable operations. As a sustainability consulting firm, Our Team has experience working with districts, higher education and commercial clients in developing meaningful sustainable operations practices.

By integrating LEED project management and sustainability consulting in the owner's representative services, the PMC team will position CHUH to truly leverage the investment it will make in sustainability and usability by creating space to articulate goals and practices of the District

Trade Contractor Session: After trade contracts are awarded, a trade contractor session is scheduled. One of the key outcomes of the facilitated session with the trade contractors and the owner team is the establishment of an agreement on how the team will function for a successful project. With public construction reform comes a variation of approaches on how the trades, construction manager/design-builder, owner and architect are aligned. A trade contractor session helps the team describe each other's expectations and goals, opportunities to expose potential difficulties and to set up dispute resolution tools. PMC has developed group role playing exercises for the sessions that are based on "case studies," actual conflicts and issues that have arisen on previous school projects. These fictionalized but reality-based exercises afford the team the opportunity to play-act the resolution of a dispute.

Closeout Session: As a building project approaches the 75% completion mark, we conduct a closeout partnering session which includes the owner team, construction manager or design-builder, architect, owner supplied contractors and trade contractors. One of our primary goals at a closeout session is validation of the project completion schedule in conjunction with flushing out potentially hidden cost or owner activity coordinator issues. In addition to closeout coordination, a discussion of training schedules, guarantee/warranty starts, delivery of O&M manuals, punch lists, move management and punch processes are established at the session.

Third-Party Partnership Session: Collaboration with public/private entities can provide the impetus for a school building project to become a reality. Creative approaches to the sharing of public space and expense, though good in theory, requires very specific and well-crafted partnership agreements. PMC has had the opportunity to facilitate these arrangements for school districts and other types of public owners over the past few years. Each situation and partnership is unique and requires extensive discussion regarding the partnership concept before the financial and operating model can be agreed upon and documents prepared.

Intervention/Dispute Resolution Session: The nature of traditional construction can be confrontational and even the best projects have disputes. Our facilitators' prior experience on all sides of construction disputes, whether representing plaintiffs or defendants, or acting as claimants, designers or owners, gives us the background necessary to serve in the role of neutral third-party during intervention and dispute resolution partnering meetings. Our goal is to maximize project communications, encourage the open exchange of information for dialogue, and assist in the resolution of all disputes within 30 days. One of the processes we put in place at the executive and trade contractor sessions is the alternate dispute resolution process (ADR). By emphasizing the need to surface disputes, whether internal to the executive team or involving trade contractors, we have been able to achieve resolution in a prompt fashion, before disputes fester and grow, and without resulting in costly and time-consuming adjudication.



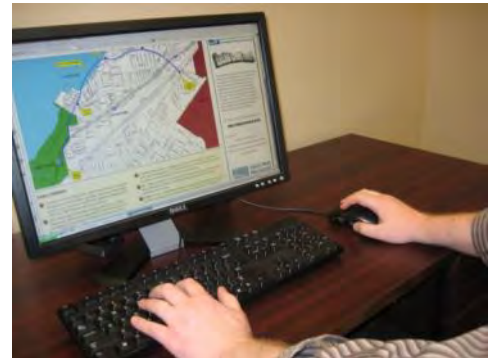
17. project management systems •

The record keeping, reporting, monitoring and other information management systems that the firm would propose to use for the Project.

Cost & Change Control

Regency's success in managing cost and controlling changes is founded in the synthesis of three major elements:

- Expedition Software
- An understanding of the origins of change
- A clearly articulated process for identifying, tracking and monitoring change



Expedition Software

Regency uses Expedition as its contract management and project administration software. Expedition helps to ensure the planned construction schedule is executed successfully to an on-time and on-budget completion through contract control, change management, RFI communication management and submittal tracking.

Expedition gives our project team peace of mind that all project information and documents are linked to critical issues and available on demand. This tool provides our project team with a clear, consistent approach to managing our projects, its paper flow, and decision making process.

Expedition allows a comprehensive solution for multiple users and multiple projects; it is also an excellent tool to manage multiple project costs. Expedition's cost worksheet reports the detailed implications of every cost transaction. As cost documents are created, the cost worksheet is instantly updated, allowing our team real-time project information we need to analyze the project status and to assist in making the best cost management decisions.



Managing Change

Change is inevitable, and change is not always a negative force. Understanding what causes change and how the change is managed determines the degree to which changes affect a construction project.

Our approach to change management is founded on the timely processing of contract changes to maintain project control. From the inception of a change, Regency makes every effort to expedite each step in the processing chain. We manage changes from the initial cost estimate through negotiations and final approval, and our project managers are able to immediately identify the impact a change will have on our project costs and schedule.

Project Closeout

Close-out represents a final confirmation that the intent and expectations of the project have been met and supports Regency's ongoing commitment to maintain quality control through occupation. Regency has developed a Closeout Matrix that is carefully maintained by our project staff as part of our QA/QC requirements for every project.

Regency's Move Planning & Management (MP&M)

Each successful building program should begin with the end in mind. Just as budgets set the fiscal objectives of the project and schedules establish the most logical path to achieving the completion objectives, proactive planning for move-in at the outset of the project can relieve a lot of the uncertainties and most of the anxieties of "move day".



Regency's Move Planning & Management (MP&M) approach is simple and cost effective. Our approach is like peeling an onion. We segregate the layers of the larger task, "the move", into manageable smaller tasks. Unlike projects of the past that reused existing furniture, casework and moveable equipment most projects today budget for new furniture, casework and movable equipment, thus eliminating the chore of moving existing assets while attempting to maintain operation. The task of incorporating those items into the work are often responsibility of our Construction Management or Contracting staff to assist with the procurement, monitoring and installation all within the established schedule.

Service Approach

Since our inception, Regency has assisted our clients with the transitional aspects of new and renovation projects. Regardless of the size or scope of the project the ultimate objective is to successfully move people and their operational needs in an organized, expedient manner.

The process of Move Management begins in the programming phase of the established project. It is during the phase of the project when expectations are established and those affected by the proposed plan will be identified.

With the advent of new furniture, completely new data/ telephone systems and hardware, the process of transitioning from old to new has shifted some of the burden of the move away from the client and onto the contractors. There are, however, valuable records, textbooks, library stacks, food stuffs and such to account for and transition to the new facilities. Most important to the success of a move is the preparation of the client's staff for the big event.

The Dynamics of in-place renovations differ from the prospects of moving into a new facility and our team strives to prepare the client's staff for each eventuality.

The Process

Programming Phase

Discussions regarding facilities move at the programming phase may seem somewhat premature to some members of the client team. However, it is at this stage of project development that expectations are defined, budgets are confirmed and the transition begins.

Expectations

In addition to developing program space needs and relative adjacencies to one another, our team begins to evaluate the following:

- Time lines of project implementation – from design to post construction are developed.
- “What goes and what stays” regarding existing furniture, fixtures and equipment (FF & E). An inventory of these items that will transition to the new facilities is assessed, categorized, quantified and measured.

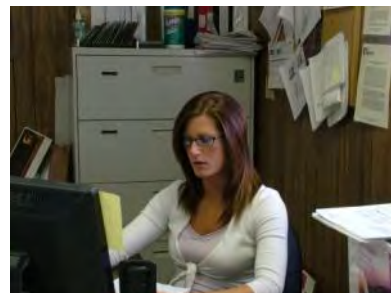


The Move Process

DESIGN PHASE

At the appropriate time, usually at mid Contract Document Development, our team establishes a sequence of work implementation and move process, in CAD form, to graphically illustrate the transition process. The following is an example of a school renovation and transition plan where end users were active participants in its development.

Phasing plans such as the ones depicted here verify and solidify the assumptions made during the programming phase.



COMMUNICATION – THE KEY TO SUCCESS

The involvement of key personnel early in the planning process will go a long way to lessen the anxiety of a move. The communication of accurate, relevant and consistent information will serve to eliminate misunderstandings and wasted energy.

All meetings relevant to the move process will be documented and those minutes will be distributed to the key stakeholders. Internal publications such as newsletters, status flyers or web site postings are helpful tools to maintaining awareness of the process. Regency often provides support or input to the communication avenues.



CONSTRUCTION PHASE

Shortly after meaningful construction begins, our team will begin the process of assisting the client with the acquisition of items not included in the building contracts such as furniture, communications equipment and systems, security systems if applicable, etc.

Our team will take the lead to develop the scopes of work, manage the Request for Proposal (RFP) process, conduct Bidder/Vendor interests meetings and site visits, review pricing and conduct Bidder/Vendor qualifications and review and make award recommendations.

SUPPLIER OR VENDOR POST AGREEMENT AWARD SERVICES

The dynamics of managing the post award process varies from project to project, however there are consistencies that our team accomplishes regardless of the scope or size of the project. These items include:

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- Contract or Agreement Execution: Our staff will lead the contract preparation and execution process. These agreements vary in form and complexity to include purchase orders to multiple page A.I.A. documents.
- Integration of fabrication, delivery and installation information into the Master Critical Path Schedule.
- Manufacturing/Fabrication and shipping tracking: Regency will visit fabrication plants at appropriate intervals to monitor production schedules or to verify stored materials or equipment.
- Coordinate on-site logistics and Just-In-Time deliveries to ensure a smooth transition and least disruption to building operations.
- Expedite Rough-In information and field coordination items.



18. budget management

Demonstrate the firm's ability to assist Owner with managing various budgets and schedules in complex and other, multi-phased projects.

Since our inception in 1994 Regency has managed hundreds of building programs that required phased implementation either in intra-segment phasing of multiple facilities construction or in a sequentially segmented phasing dictated by funding. In either instance building specific budgets, schedules and documents were logged, tracked and reported on independent of one another. A recent example of this was our work on the Lakewood City School Multi-Phased program.

Lakewood's District-Wide Master Plan projected a total expenditure of over \$250 million dollars and included the construction of new facilities, additions and renovation to existing facilities and the removal of specific buildings from the district's inventory. The district engaged the community in a series of well-planned information sharing sessions and what resulted was a three-phased plan for the total implementation of the community driven master plan. Phase One included the construction of four new facilities: two Elementary Schools and two new Middle Schools. Phase Two included the renovation of two existing facilities and a major addition/renovation to the existing High School. Phases One and Two are complete. Phase Three will complete the renovation, addition and systematic removal of portions of the existing High School. Phase Three will also be aided by OSFC funding. Most of the facilities in Lakewood are Pre-WWII vintage facilities which are very similar to those at Cleveland Heights-University Heights.



Throughout each phase, Regency tracked the work, budgets and documents associated with each building independent from those of the other building in that phase for control purposes but also due to the fact that each building had different contractors, material providers and design teams. The common thread during this control process was Regency's staff and our control systems. In addition to tracking each building independently, we prepare a consolidated report of budgets, schedules and a master plan executive summary status report monthly.

Schedule Tracking. Regency used Primavera's P6/7 software program to develop the individual building schedules. We extracted key elements from all schedules for inclusion in the consolidated Master Schedule that was included in the Executive Summary. In this instance the schedules were updated monthly and each week a three-week look-ahead mini schedule was produced which afforded the project team the opportunity to stay focused on short term objectives as well as the long term objects depicted on the overall schedule. As your representative, we will monitor the development of the individual schedules by the construction team to ensure all key elements are included. We will require schedules to be produced using

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P6/7 or newer so that we can extract elements from those documents for inclusion in our monthly management reports and our consolidated Master Schedule. We will require all activities contained in the individual schedules to be manpower loaded in addition to being dollar loaded. The manpower loading will provide us with a projection of manpower needs for each activity and a valuable tool for monitoring proper staffing of the individual tasks. The dollar loading of activities will provide a projection of cash expenditures, show if activities are front-end loaded thus resulting in an unbalanced expenditure of funds versus progress, and will serve as a cross check at each payment application request versus progress achieved.

Budget Tracking. Regency uses our in-house Excel-based budget development and control system to prepare estimates and master budget control documents. Having prepared hundreds of control estimates and budgets for school programs we will monitor the documents prepared by the contracting team to ensure all major elements are included in these documents. Having managed projects using the Construction Management at Risk delivery approach, we are well aware of the key elements that should be included in CM at Risk estimates and CM at Risk generated GMPs. For example, CM at Risk estimate line items should be broken down in material and labor, utility costs should be covered within the estimate and GMP, Contingencies need to be established and an understanding on how and when the contingencies can be used.



Each contractor produced estimate will include all hard cost items. Regency will incorporate the hard construction numbers in a master estimate for each building program that will include “soft cost” items such as design fees/total compensation, owner contingencies, and testing agency budgets, abatement costs, legal costs, FFE budgets, etc. and any external funding sources that are specific to that facility will be included and tracked accordingly.

Each month our team will prepare a consolidated budget report that accounts for all hard and soft costs by facility and tracks all external funding sources. These reports will be reconciled with the district's Treasurer and Business Manager monthly.

Owner Procurement. In addition to managing and guarding the interest of the CHUH School District throughout the various phases of the facilities plan, our team will, on behalf of CHUH, manage all of the specifics associated with the selection, procurement, and installation of Owner provided goods and services not purchased through the construction contracts. Knowing the processes of design and construction, there are many key owner provided items that need to be procured prior to the start of construction. The following are a few key items we have identified that need to be procured this summer to keep the project on schedule.

- **Temporary Modular Education Facilities** – Due to the long lead nature of procuring rental Modular Educational Facilities, we are recommending that we start the procurement process this winter with the understanding that procurement is contingent on passage of the bond issue. Over the winter we will need to establish in detail the number of teaching stations, student counts and space needs required to aid in determining the number of temporary modular units required. Once this information is

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confirmed, we will prepare a design-build proposal ready for public notice by the end of this year. To make the schedule of having the modular campus totally operational by the 2015-2016 school year we need to have a contract by the end of 2013.

- **Environmental and Geotechnical Services.** – Over the summer we recommend we solicit qualifications and select geotechnical and environmental firms to perform investigative work on the Monticello site. We will need soil information regarding the Monticello site early in the process to provide to the modular vendors.

Student Involvement. In addition to traditional project management of managing budgets, schedules and phasing, we believe our role as owner's representative should include managing the engagement of students throughout the process of design and construction. The establishment of a student engagement program can be fun and informative but can also become an educational tool for math, science and communication. The Regency team has developed unique tools for student engagement that they have been successfully incorporating into school district facilities programs. The following is a summary of the types of Regency Construction student-centered programs that can become part of the Cleveland Heights-University Heights facilities program.

The Regency Team has developed a Junior Core Team program for middle school students who would be engaged right from the beginning of a project. The Junior Core Team would be composed of students representing grades 4 thru 8 assigned to each middle school building project. The students would take on the roles of owner, architect and constructor and like the actual project team would meet at key milestones to participate in educational exercises in design and construction. Working with the district's educators, we would take the lead in organizing students and setting up the parameters of the program. The architects and the CM at Risk or design-build teams would also be key participants. Periodically the Junior Core Team would make a presentation to the Board telling them about the projects. Usually each Junior Core Team consists of 25-30 students for each building project and since these are multi-year projects, students will matriculate through the program providing opportunities for new students to participate. The students would learn how a building project is accomplished and how the math, science and communication they are learning in school relates to real world experiences. In addition to the education benefits these students become Ambassadors for the project.

Regency Construction experience with students in grades 1 thru 3 has shown that simpler in-school programs work best, incorporating a puzzle reading program has proven successful with younger students. Having puzzles made of the building renderings and incorporating the receipt of puzzle pieces based on the completion of reading or math assignments, has proven to be a great way to engage younger children into the program.

For the High School students, we would like to work with the architects, CM at Risk or design-builders in the development of some form of internship programs. The direct engagement of students in the project provides the opportunity for success and will make for a more successful building.

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Regency has extensive experience managing school projects that have been funded by a variety of funding sources. There are a number of key elements that we take into consideration when presented with these opportunities. A few items for consideration are:

- **Receipt of Funds.** The funding source is a PLEDGE resulting in a phased receipt of funds, funds received in a lump sum, etc.
- **Reporting and Tracking.** These are special reports required that notify the donor or lender when funds are expended
- **Inspection of Work.** These are requirements that a third-party representative verify work in place prior to release of funds
- **Earmarked Funds.** These are funds that are earmarked for a specific element or phase of work by a donor. Some earmarked funds pledges come in over a period of time and others come in as a lump sum donation. In the case of pledges over time, Cleveland Heights-University Heights School District will need to have a process in place to account for upfront payments of work specific to pledge work prior to the receipt of actual funds.
- **Material Donations/Volunteer Labor Services.** Many private companies are donating goods and services to programs to help offset the financial burden of the owner. As an example, it is not uncommon for organizations such as Sherman-Williams to donate paint and/or labor to school programs. Also, private companies, parents or civic-minded organizations will volunteer time to perform painting, cleaning, etc. These efforts need to be monitored to determine when in the schedule these events should take place and to what effect these efforts could have on the overall project time line.



Regency has managed school projects with all of the above (and more) scenarios. Our \$80 million Elyria High School project had upwards of a dozen pledges, lumps sum donations, in-kind donation, material donations, etc. totaling approximately \$2 million. All items were independently logged, tracked and coordinated by Regency. Major donors included the local healthcare provider, RIGID Tools, numerous alumni members, families and Invacare, to name a few.

Our Construction Management at Risk services for the Breakthrough Charter Schools, a four-building program, has a number of funding sources and pledges of manpower or materials that Regency is cost/delivery tracking, coordinating work with non-donors and managing the sub-contracting accounting process where materials are being donated or provided at cost to the sub-contractors. Donors to this program include paint and labor by Sherwin-Williams.

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Our Construction Management as Agent assignment for the Hudson City School New Middle School Stadium program had a number of civic donor dollars involved including one major donation totaling more than \$1 million.



19. project delivery counseling and project management •

Experience with working within the construction management at risk, general contracting and/or multiple prime contractor delivery methods.

Project Management Consultants LLC is the preeminent consulting firm in the State of Ohio when it comes to project delivery selection and implementation. Our consultants facilitated the Ohio Construction Reform Panel and played a critical role in the formation of the legislation and rules that now permit alternative project delivery methods for K-12 construction in the State of Ohio. Various public entities, including the Ohio School Facilities Commission, Department of Administrative Services, Inter-University Council, institutions of higher education and school districts, have called upon us to render advice as to project delivery selection and implementation of alternate methods, including bridging design-build, CM at Risk, and general contracting.

Even before the new reform legislation became effective, PMC successfully introduced both bridging design-build and construction management at risk methodologies to public owners in the State of Ohio. For example, utilizing the “urgent necessity doctrine,” PMC employed a bridging design-build methodology for rebuilding a high school destroyed by a tornado for the Lake Local School District; bridging design-build was also utilized for the Cleveland Convention Center & Global Innovation Center project through implementation of a development model; and PMC created a method for CM at Risk, known as the “GMP as financial accommodation model,” for the Cleveland Heights-University Heights Main Library project on Lee Road, as well as Huntington Center (formerly Lucas County Arena) and the Toledo Mud Hens Fifth Third Field in Toledo. For each of these projects, PMC was responsible for conceptualizing the project delivery method, soliciting statements of qualifications and proposals from the criteria architect, design-builder and/or construction manager, and preparing and negotiating all related contracts. Fortunately, through the implementation of Ohio Construction Reform, these alternate project delivery methods are now directly available to the Cleveland Heights-University Heights City School District without any need for the “workaround” strategies employed by PMC on the projects referenced above. With the advent of construction reform, PMC has been engaged by several of the initial users of these new project delivery methods, such as The Ohio State University and Miami University, to assist with implementation of those methods.

For each new project, PMC recommends that the owner conduct a project delivery workshop to make a reasoned assessment of the most appropriate project delivery method. The workshop includes an educational component, assessment and prioritization of critical project goals and criteria, and a comparative evaluation of competing project delivery methods to determine the most appropriate method for the given project. PMC has conducted dozens of such workshops for billions of dollars of construction throughout the United States. PMC is clearly the industry leader when it comes to implementation of alternative project delivery methods for public owners in the State of Ohio.



20. CHUH & ohio school experience •

Describe any previous work performed in connection with the Owner or any other Ohio public school district.

For the past three years PMC and Regency have worked for the District in various capacities and have developed a great working relationship with the Board, Administrative Staff, Educational Staff, Operations Staff and Community members. The PMC team was responsible for facilitating the process for the development of the overall Master Facilities Plan. Our facilitation work included supporting the Lay Facilities Committee and the Board in the development of district wide facility plan. PMC also worked as a liaison between the district and the Ohio Facilities Construction Commission facilitating the final ELPP agreement with the State. In addition to working on the New Facilities Plan our team has provided Capital project Owner's representation as outlined below.

Owner's Representation: PMC has worked with the Owner on the planning, design and construction of renovations, additions and miscellaneous capital repair projects since 2010 to coordinate better space utilization, enhanced educational opportunities in classrooms, innovative educational processes, improved site logistics, improved district security and capital repair projects and programs, to include the following:

1. Wiley bus parking improvements (2010)
2. District wide paving (2010)
3. Board of Education building: transportation restrooms (2010)
4. Roxboro and Fairfax Elementary emergency generators (2010)
5. District wide SmartBoard installations (2010-2012)
6. Canterbury corridor flooring replacement (2011)
7. Coventry repurposing, signage, exterior lighting and roof repairs (2011)
8. Delisle Center Second floor conversion to Options Education Program (2011)
9. Gearity roof repairs and classroom improvements to John Carroll rooms (2011)
10. Noble playground (2011)
11. Noble preschool room and media center work room modifications (2011)
12. Wiley Middle School Parking lot improvements (2011)
13. Heights High auditorium catwalk (2011) and sound system improvements (2012)
14. Heights High media center library flooring and uninvent repairs (2012)
15. Heights High New Tech program renovations (2012, 2013)
16. Heights High recording studios renovations (2012)
17. Roxboro Middle School and Oxford Pilot project renovations (2012)



Statement of Qualifications for Owner's Representative Services

- 18. Monticello New Tech renovations (2013)
- 19. Fairfax roof repair (2013)
- 20. District wide security doors (2013)
- 21. District wide Public Address system security upgrades (2013)
- 22. District wide Helios A-phone upgrades (2013)
- 23. Heights High Stadium upgrades and Hall of Fame planning and design options (2011-2012)

Regency Construction Services Experience with CHUH includes:

- 1. Roxboro Middle School and Oxford Pilot project renovations (2012)
- 2. Heights High Stadium upgrades and Hall of Fame planning and design options (2011-2012)
- 3. District Wide Master Planning Options (2012 – 2013)
- 4. District Wide Enabling Projects for Master Plan (202 – 2013)
 - a. Modular Unit Swing Space Options
 - b. Swing Space Options for Athletic Facilities

PMC Ohio School District Experience. The following is a listing of public school districts PMC has performed Executive, Trade Contractor, and Closeout Sessions and on occasion we have performed for some of the listed districts Third Party Sessions and Intervention/Dispute resolution sessions. The types of projects include High Schools, Middle Schools, Elementary Schools, Single K-12 School Buildings, Career Tech Schools, School of the Arts and Specialty Schools

Ada Exempted Village School District

Ada, Ohio

Adena Local School District

Frankfort, Ohio

Akron City School District

Akron, Ohio

Alexander Local School District

Albany, Ohio

Allen East Local School District

Harrod, Ohio

Alliance City School District

Alliance, Ohio

Amanda-Clearcreek Local School District

Amanda, Ohio

Amherst Exempted Village School District

Amherst, Ohio

Ansonia Local School District

Ansonia, Ohio

Antwerp Local School District

Antwerp, Ohio

Arcanum-Butler Local School District

Arcanum, Ohio

Ashtabula Area City School District

Ashtabula, Ohio

Austintown Local School District

Youngstown, Ohio



Statement of Qualifications for Owner's Representative Services

<i>Avon Lake City School District</i> <i>Avon Lake, Ohio</i>	<i>Brunswick City School District</i> <i>Brunswick, Ohio</i>
<i>Barberton City School District</i> <i>Barberton, Ohio</i>	<i>Buckeye Central Local School District</i> <i>New Washington, Ohio</i>
<i>Barnesville Exempted Village School District</i> <i>Barnesville, Ohio</i>	<i>Buckeye Local School District (Ashtabula County)</i> <i>Ashtabula, Ohio</i>
<i>Batavia Local School District</i> <i>Batavia, Ohio</i>	<i>Bucyrus City School District</i> <i>Bucyrus, Ohio</i>
<i>Bellaire City School District School</i> <i>Bellaire, Ohio</i>	<i>Butler Technology & Career Development Schools</i> <i>Hamilton, Ohio</i>
<i>Bellefontaine City School District</i> <i>Bellefontaine, Ohio</i>	<i>Cambridge City School District</i> <i>Cambridge, Ohio</i>
<i>Bellevue City School District</i> <i>Bellevue, Ohio</i>	<i>Campbell City School District</i> <i>Campbell, Ohio</i>
<i>Berkshire Local School District</i> <i>Burton, Ohio</i>	<i>Canal Winchester Local School District</i> <i>Canal Winchester, Ohio</i>
<i>Berne Union Local School District</i> <i>Sugar Grove, Ohio</i>	<i>Canton City School District</i> <i>Canton, Ohio</i>
<i>Bethel-Tate Local School District</i> <i>Bethel, Ohio</i>	<i>Cardinal Local School District</i> <i>Middlefield, Ohio</i>
<i>Bettsville Local School District</i> <i>Bettsville, Ohio</i>	<i>Cardington-Lincoln Local School District</i> <i>Cardington, Ohio</i>
<i>Black River Local School District</i> <i>Sullivan, Ohio</i>	<i>Cedar Cliff Local School District</i> <i>Cedarville, Ohio</i>
<i>Blanchester Local School District</i> <i>Blanchester, Ohio</i>	<i>Centerburg Local School District</i> <i>Centerburg, Ohio</i>
<i>Bloom-Carroll Local School District</i> <i>Carroll, Ohio</i>	<i>Central Local School District</i> <i>Sherwood, Ohio</i>
<i>Bloom-Vernon Local School District</i> <i>South Webster, Ohio</i>	<i>Chesapeake Union Exempted School District</i> <i>Chesapeake, Ohio</i>
<i>Botkins Local School District</i> <i>Botkins, Ohio</i>	<i>Chillicothe City School District</i> <i>Chillicothe, Ohio</i>
<i>Bradford Exempted Village School District</i> <i>Bradford, Ohio</i>	<i>Cincinnati City School District</i> <i>Cincinnati, Ohio</i>
<i>Bridgeport Exempted Village School District</i> <i>Bridgeport, Ohio</i>	<i>Clay Local School District</i> <i>Portsmouth, Ohio</i>
<i>Bright Local School District</i> <i>Mowrystown, Ohio</i>	<i>Claymont City School District</i> <i>Dennison, Ohio</i>
<i>Bristol Local School District</i> <i>Bristolville, Ohio</i>	<i>Clear Fork Valley Local School District</i> <i>Bellville, Ohio</i>
<i>Brookfield Local School District</i> <i>Brookfield, Ohio</i>	<i>Clearview Local School District</i> <i>Lorain, Ohio</i>
<i>Brookville Local School District</i> <i>Brookville, Ohio</i>	<i>Cleveland City School District</i> <i>Cleveland, Ohio</i>



Statement of Qualifications for Owner's Representative Services

*Clinton-Massie Local School District
Clarksville, Ohio*

*Cloverleaf Local School District
Lodi, Ohio*

*Clyde-Green Springs Exempted Village School District
Clyde, Ohio*

*Coldwater Exempted Village School District
Coldwater, Ohio*

*Colonel Crawford Local School District
North Robinson, Ohio*

*Columbia Local School District
Columbia Station, Ohio*

*Columbus City School District
Columbus, Ohio*

*Columbus Grove Local School District
Columbus Grove, Ohio*

*Conneaut Area City School District
Conneaut, Ohio*

*Continental Local School District
Continental, Ohio*

*Cory-Rawson Local School District (Hancock County)
Rawson, Ohio*

*Coshocton City School District
Coshocton, Ohio*

*Crestline Exempted Village School District
Crestline, Ohio*

*Crestview Local School District (Columbiana County)
Columbiana, Ohio*

*Crestview Local School District (Richland County)
Ashland, Ohio*

*Crestview Local School District (Van Wert County)
Convoy, Ohio*

*Crestwood Local School District
Mantua, Ohio*

*Crooksville Exempted Village School District
Crooksville, Ohio*

*Danville Local School District
Danville, Ohio*

*Dawson-Bryant Local School District
Coalgrove, Ohio*

*Dayton City School District
Dayton, Ohio*

*Defiance City School District
Defiance, Ohio*

*East Cleveland City School District
East Cleveland, Ohio*

*East Clinton Local School District
Leescreek, Ohio*

*East Guernsey Local School District
Old Washington, Ohio*

*East Liverpool City School District
East Liverpool, Ohio*

*East Muskingum Local School District
New Concord, Ohio*

*East Palestine City School District
East Palestine, Ohio*

*Eastern Local School District (Brown County)
Sardinia, Ohio*

*Eastern Local School District (Meigs County)
Reedsville, Ohio*

*Eastern Local School District (Pike County)
Beaver, Ohio*

*Eaton Community City School District
Eaton, Ohio*

*Edgerton Local School District
Edgerton, Ohio*

*Edgewood City School District
Trenton, Ohio*

*Edon-Northwest Local School District
Edon, Ohio*

*Elgin Local School District
Marion, Ohio*

*Elida Local School District
Elida, Ohio*

*Elmwood Local School District
Bloomdale, Ohio*

*Elyria City School District
Elyria, Ohio*

*Euclid City School District
Euclid, Ohio*

*Evergreen Local School District
Metamora, Ohio*

*Fairfield Local School District
Leesburg, Ohio*

Fairfield Union Local School District



Statement of Qualifications for Owner's Representative Services

West Rushville, Ohio
Fairland Local School District
Proctorville, Ohio
Fairlawn Local School District
Sidney, Ohio
Fairless Local School District
Navarre, Ohio
Fayetteville-Perry Local School District
Fayetteville, Ohio
Federal Hocking Local School District
Stewart, Ohio
Felicity-Franklin Local School District
Felicity, Ohio
Findlay City School District
Findlay, Ohio
Fort Loramie Local School District
Fort Loramie, Ohio
Fort Recovery Local School District
Fort Recovery, Ohio
Franklin Local School District
Duncan Falls, Ohio
Franklin Monroe School District
Pitsburg, Ohio
Fredericktown Local School District
Fredericktown, Ohio
Fremont City School District
Fremont, Ohio
Frontier Local School District
New Matamoras, Ohio
Gahanna-Jefferson Public School District
Gahanna, Ohio
Galion City School District
Galion, Ohio
Gallia-Jackson-Vinton Joint Vocational School District
Rio Grande, Ohio
Gallipolis City School District
Gallipolis, Ohio
Garfield Heights City School District
Garfield Heights, Ohio
Geneva Area City School District
Geneva, Ohio
Genoa Area Local School District
Genoa, Ohio

Georgetown Exempted Village School District
Georgetown, Ohio
Gibsonburg Exempted Village School District
Gibsonburg, Ohio
Girard City School District
Girard, Ohio
Goshen Local School District
Goshen, Ohio
Graham Local School District
Saint Paris, Ohio
Grand Valley Local School District
Orwell, Ohio
Granville Exempted Village School District
Granville, Ohio
Green Local School District
Smithville, Ohio
Greeneview Local School District
Jamestown, Ohio
Greenfield Exempted Village School District
Greenfield, Ohio
Groveport Madison Local School District
Groveport, Ohio
Hamilton City School District
Hamilton, Ohio
Hamilton Local School District
Columbus, Ohio
Hardin Northern Local School District
Dola, Ohio
Hardin-Houston Local School District
Houston, Ohio
Hicksville Exempted Village School District
Hicksville, Ohio
Highland Local School District
Medina, Ohio
Hillsboro City School District
Hillsboro, Ohio
Holgate Local School District
Holgate, Ohio
Hopewell-Loudon Local School District
Bascom, Ohio
Hubbard Exempted Village School District
Hubbard, Ohio
Huber Heights City School District
Huber Heights, Ohio



Statement of Qualifications for Owner's Representative Services

*Huntington Local School District
Chillicothe, Ohio*

*Indian Creek Local School District
Wintersville, Ohio*

*Indian Valley Local School District
Gnadenhutten, Ohio*

*Ironton City School District
Ironton, Ohio*

*Jackson Center Local School District
Jackson Center, Ohio*

*Jackson City School District
Jackson, Ohio*

*Jackson-Milton Local School District
North Jackson, Ohio*

*Jefferson Area Local School District
Jefferson, Ohio*

*Jefferson Local School District
West Jefferson, Ohio*

*Jennings Local School District
Fort Jennings, Ohio*

*Johnstown-Monroe Local School District
Johnstown, Ohio*

*Jonathan Alder Local School District
Plain City, Ohio*

*Joseph Badger Local School District
Kinsman, Ohio*

*Kalida Local School
Kalida, Ohio*

*Kenston Local School District
Chagrin Falls, Ohio*

*Kenton City School District
Kenton, Ohio*

*Keystone Local School District
Lagrange, Ohio*

*Knox County Joint Vocational School District
Mt. Vernon, Ohio*

*LaBrae Local School District
Leavittsburg, Ohio*

*Lakewood City School District
Lakewood, Ohio*

*Lakota Local School District (Butler County)
Liberty Township, Ohio*

*Lakota Local School District (Sandusky County)
Risingsun, Ohio*

*Lebanon City School District
Lebanon, Ohio*

*Leetonia Exempted Village School District
Leetonia, Ohio*

*Leipsic Local School District
Leipsic, Ohio*

*Liberty Union-Thurston Local School District
Baltimore, Ohio*

*Licking Valley Local School District
Newark, Ohio*

*Lima City School District
Lima, Ohio*

*Lincolnvew Local School District
Vanwert, Ohio*

*Lisbon Exempted Village School District
Lisbon, Ohio*

*Logan Elm Local School District
Circleville, Ohio*

*Logan-Hocking Local School
Logan, Ohio*

*London City School District
London, Ohio*

*Lorain City School District
Lorain, Ohio*

*Louisville City School District
Louisville, Ohio*

*Lowellville Local School District
Lowellville, Ohio*

*Lynchburg-Clay Local School District
Lynchburg, Ohio*

*Mad River Local School District
Dayton, Ohio*

*Madeira City School District
Cincinnati, Ohio*

*Madison Local School District
Madison, Ohio*

*Madison Local School District
Mansfield, Ohio*

*Madison Local School District
Middletown, Ohio*

*Madison-Plains Local School District
London, Ohio*

*Manchester Local School District
Akron, Ohio*



Statement of Qualifications for Owner's Representative Services

<i>Mansfield City School District Mansfield, Ohio</i>	<i>Miller City-New Cleveland Local School District Miller City, Ohio</i>
<i>Maple Heights City School District Maple Heights, Ohio</i>	<i>Milton-Union Exempted Village School District West Milton, Ohio</i>
<i>Mapleton Local School District Ashland, Ohio</i>	<i>Minerva Local School District Minerva, Ohio</i>
<i>Maplewood Local School District Cortland, Ohio</i>	<i>Minford Local School District Minford, Ohio</i>
<i>Marion City School District Marion, Ohio</i>	<i>Minster Local School District Minster, Ohio</i>
<i>Marion Local School District Maria Stein, Ohio</i>	<i>Mississinawa Valley Local School District Unioncity, Ohio</i>
<i>Marlington Local School District Alliance, Ohio</i>	<i>Mohawk Local School District Sycamore, Ohio</i>
<i>Martins Ferry City School District Martins Ferry, Ohio</i>	<i>Montpelier Exempted Village School District Montpelier, Ohio</i>
<i>Mason City School District Mason, Ohio</i>	<i>Morgan Local School District Mcconnelsville, Ohio</i>
<i>Massillon City School District Massillon, Ohio</i>	<i>Mount Gilead Exempted Village School Mt. Gilead, Ohio</i>
<i>Maysville Local School District Zanesville, Ohio</i>	<i>Mount Healthy City School District Cincinnati, Ohio</i>
<i>McDonald Local School District McDonald, Ohio</i>	<i>Nelsonville-York City School District Nelsonville, Ohio</i>
<i>Mechanicsburg Exempted Village School District Mechanicsburg, Ohio</i>	<i>New Boston Local School District New Boston, Ohio</i>
<i>Meigs Local School District Pomeroy, Ohio</i>	<i>New Knoxville Local School District New Knoxville, Ohio</i>
<i>Mentor Exempted Village School District Mentor, Ohio</i>	<i>New Lebanon Local School District New Lebanon, Ohio</i>
<i>Miami East Local School District Casstown, Ohio</i>	<i>New Lexington City School District New Lexington, Ohio</i>
<i>Miami Trace Local School District Washington Court House, Ohio</i>	<i>New Miami Local School District Hamilton, Ohio</i>
<i>Middletown City School District Middletown, Ohio</i>	<i>New Riegel Local School District New Riegel, Ohio</i>
<i>Mid-East Career and Technology Centers Zanesville, Ohio</i>	<i>Newark City School District Newark, Ohio</i>
<i>Midview Local School District Grafton, Ohio</i>	<i>Newcomerstown Exempted Village School District Newcomerstown, Ohio</i>
<i>Milford Exempted Village School District Milford, Ohio</i>	<i>Newton Falls Exempted Village School District Newton Falls, Ohio</i>
<i>Millcreek-West Unity Local School District West Unity, Ohio</i>	<i>Newton Local School District Pleasant Hill, Ohio</i>



Statement of Qualifications for Owner's Representative Services

*Niles City School District
Niles, Ohio*

*North Baltimore Local School District
North Baltimore, Ohio*

*North Central Local School District
Creston, Ohio*

*North College Hill City School District
Cincinnati, Ohio*

*North Fork Local School District
Utica, Ohio*

*North Union Local School District
Richwood, Ohio*

*Northeastern Local School District
Defiance, Ohio*

*Northern Local School District
Thornville, Ohio*

*Northmont City School District
Englewood, Ohio*

*Northmor Local School District
Galion, Ohio*

*Northridge Local School District
Dayton, Ohio*

*Northwest Local School District
Mcdermott, Ohio*

*Northwest Local School District
Canal Fulton, Ohio*

*Northwestern Local School District
West Salem, Ohio*

*Norton City School District
Norton, Ohio*

*Norwood City School District
Norwood, Ohio*

*Oak Hill Union Local School District
Oak Hill, Ohio*

*Oakwood City School District
Dayton, Ohio*

*Ohio School for the Deaf and
Ohio State School for the Blind
Columbus, Ohio*

*Ohio Valley School District
West Union, Ohio*

*Olmsted Falls City School District
Olmsted Falls, Ohio*

*Orrville City School District
Orrville, Ohio*

*Osnaburg Local School District
East Canton, Ohio*

*Otsego Local School District
Tontogany, Ohio*

*Ottawa-Glandorf Local School District
Ottawa, Ohio*

*Ottoville Local School District
Ottoville, Ohio*

*Painesville City Local School District
Painesville, Ohio*

*Paint Valley Local School District
Bainbridge, Ohio*

*Pandora-Gilboa Local School District
Pandora, Ohio*

*Parkway Local School District
Rockwood, Ohio*

*Parma City School District
Parma, Ohio*

*Patrick Henry Local School District
Hamler, Ohio*

*Paulding Exempted Village School District
Paulding, Ohio*

*Pettisville Local School District
Pettisville, Ohio*

*Pickaway-Ross Career & Technology Center
Chillicothe, Ohio*

*Pickerington School District
Pickerington, Ohio*

*Pike County Area Joint Vocational School District
Pike-ton, Ohio*

*Pike-Delta-York Local School District
Delta, Ohio*

*Pioneer Career & Technology Center
Shelby, Ohio*

*Plymouth-Shiloh Local School District
Plymouth, Ohio*

*Portsmouth City School District
Portsmouth, Ohio*

*Preble-Shawnee Local School District
Camden, Ohio*

*Pymatuning Valley Local School District
Andover, Ohio*

Ravenna City School District



Statement of Qualifications for Owner's Representative Services

Ravenna, Ohio
Reynoldsburg City School District
Reynoldsburg, Ohio
Ridgedale Local School District
Morrill, Ohio
Ridgewood Local School District
West Lafayette, Ohio
Ripley-Union-Lewis-Huntington Local School District
Ripley, Ohio
Rittman Exempted Village School District
Rittman, Ohio
River Valley Local School District
Caledonia, Ohio
Riverdale Local School District
Mt. Blanchard, Ohio
Riverside Local School District
Degraff, Ohio
Rock Hill Local School District
Ironton, Ohio
Ross Local School District
Hamilton, Ohio
Russia Local School District
Russia, Ohio
Sandy Valley Local School District
Magnolia, Ohio
Scioto County Joint Vocational School District
Lucasville, Ohio
Scioto Valley Local School District
Piketon, Ohio
Sebring Local School District
Sebring, Ohio
Seneca East Local School District
Attica, Ohio
Sheffield-Sheffield Lake City School District
Sheffield Village, Ohio
Shelby City School District
Shelby, Ohio
Sidney City School District
Sidney, Ohio
South Central Local School District
Greenwich, Ohio
South Point Local School District
South Point, Ohio
South Range Local School District
North Lima, Ohio
Southeast Local School District
Applecreek, Ohio
Southeastern Local School District
Chillicothe, Ohio
Southern Hills Joint Venture School District
Georgetown, Ohio
Southern Local School District (Columbiana County)
Salineville, Ohio
Southern Local School District (Meigs County)
Racine, Ohio
Southern Local School District (Perry County)
Corning, Ohio
Southington Local School District
Southington, Ohio
Southwest Licking Local School District
Pataskala, Ohio
Spencerville Local School District
Spencerville, Ohio
Springfield City School District
Springfield, Ohio
Springfield Local School District
Akron, Ohio
St. Henry Consolidated Local School District
Saint Henry, Ohio
St. Marys City School District
St. Marys, Ohio
Steubenville City School District
Steubenville, Ohio
Strasburg-Franklin Local School District
Strasburg, Ohio
Struthers Local School District
Struthers, Ohio
Stryker Local School District
Stryker, Ohio
Swanton Local School District
Swanton, Ohio
Switzerland Local School District
Woodsfield, Ohio
Symmes Valley Local School District
Willowwood, Ohio
Talawanda City School District



Statement of Qualifications for Owner's Representative Services

Oxford, Ohio
Teays Valley Local School District
Ashville, Ohio
Tecumseh Local School District
New Carlisle, Ohio
Three Rivers Local School District
Cleves, Ohio
Tiffin City School District
Tiffin, Ohio
Toledo City School District
Toledo, Ohio
Triad Local School District
North Lewisburg, Ohio
Trimble Local School District
Glouster, Ohio
Tri-Valley Local School District
Dresden, Ohio
Tri-Village Local School District
New Madison, Ohio
Trotwood - Madison City School District
Trotwood, Ohio
Tuslaw Local School District
Massillon, Ohio
Twin Valley Community Local School District
West Alexandria, Ohio
Union Local School District
Morristown, Ohio
Union Scioto Local School District
Chillicothe, Ohio
United Local School District
Hanoverton, Ohio
Upper Scioto Valley Local School District
McGuffey, Ohio
Upper Valley Joint Vocational School District
Piqua, Ohio
Valley Local School District
Lucasville, Ohio
Van Wert City School District
Van Wert, Ohio
Vanguard-Sentinel Joint Vocational School District
Fremont, Ohio
Vantage Career Center
Van Wert, Ohio
Versailles Exempted Village School District

Versailles, Ohio
Vinton County Local School District
McArthur, Ohio
Wadsworth City School District
Wadsworth, Ohio
Wapakoneta City School District
Wapakoneta, Ohio
Warren City School District
Warren, Ohio
Warrensville Heights City School District
Warrensville Heights, Ohio
Washington Court House City School District
Washington Court House, Ohio
Washington-Nile Local School District
West Portsmouth, Ohio
Waterloo Local School District
Atwater, Ohio
Wauseon Exempted Village School District
Wauseon, Ohio
Waverly City School District
Waverly, Ohio
Wayne County School District Career Center
Smithville, Ohio
Wayne Trace Local School District
Haviland, Ohio
Waynesfield-Goshen Local School District
Waynesfield, Ohio
Wellston City School District
Wellston, Ohio
Wellsville Local School District
Wellsville, Ohio
West Branch Local School District
Beloit, Ohio
West Clermont Local School District
Cincinnati, Ohio
West Liberty-Salem Local School District
West Liberty, Ohio
Western Brown School District
Mt. Orab, Ohio
Western Local School District
Latham, Ohio
Western Reserve Local School District
Collins, Ohio
Westfall Local School District
Williamsport, Ohio



Statement of Qualifications for Owner's Representative Services

Wheelersburg Local School District

Wheelersburg, Ohio

Whitehall City School District

Whitehall, Ohio

Williamsburg Local School District

Williamsburg, Ohio

Wilmington/Preble-Shawnee School District

Wilmington, Ohio

Windham Exempted Village School District

Windham, Ohio

Xenia Community City School District

Xenia, Ohio

Youngstown City School District

Youngstown, Ohio

Zane Trace Local School District

Chillicothe, Ohio

Zanesville City School District

Zanesville, Ohio

Regency has touched nearly 250 Ohio school systems – more than 40% of the State's PK-12 districts. A profile of our PK-12 districts include the following:

Antwerp Local

Ashtabula Joint Vocational School

Aurora City

Barnesville Exempted Village

Bay Village Local Schools

Bellaire City

Breakthrough Charter Schools

Buckeye Central Local

Bucyrus City

Cambridge City

Cardington-Lincoln Local

Carrollton Exempted Village

Cleveland Heights-University Heights

Cleveland Municipal

Coshocton City

Crestview Local

East Guernsey Local

Edon Northwest Local

Elyria City

Genoa Area

Fairless Local

Fairview Park City

Franklin Local

Indian Valley Local

Knox County Career Center

Lakewood City

Licking Heights Local

Licking Valley Local

Lucas Local

Mahoning Career

Technology Center

Minford Local

Montpelier Exempted Village

Mt. Gilead Local

Newcomerstown Exempted Village

Noble Local

North Ridgeville City

North Union Local

Olmsted Falls City

Paulding Exempted Village

Perry Local Schools

Plymouth-Shiloh Local

Ridgewood Local

Shaker Heights City

Springfield Local Schools

South Central Local

Strasburg-Franklin Local

Wayne Trace Local

Wellington Exempted Village Schools





Statement of Qualifications for Owner's Representative Services

21. certificates of insurance •

PMC is a wholly-owned subsidiary of Thompson Hine LLP. Attached is a Certificate of Liability Insurance showing the current limits of liability for commercial general liability and business automobile liability for PMC and Thompson Hine.

Owner's representative services are performed through Project Management Consultants-Owner's Representative Services LLC, a wholly-owned subsidiary of PMC. Attached is a Certificate of Liability Insurance evidencing professional liability coverage for those services.

Services that are not inconsistent with the practice of law, such as facilitation services, are covered under Thompson Hine's ALAS policy. Attached is a Confirmation of Insurance evidencing PMC's professional liability coverage for those services.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

11/6/2013

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER The James B. Oswald Company 1100 Superior Avenue East Suite 1500 Cleveland, OH 44114	(216) 367-8787	CONTACT NAME: Carmen Edgehouse PHONE (A/C, No, Ext): (216) 658-5202 FAX (A/C, No): (216) 658-5203 E-MAIL ADDRESS: cedgehouse@oswaldcompanies.com														
INSURED Thompson Hine LLP Project Management Consultants LLC 3900 Key Center 127 Public Square Cleveland, OH 44114-1291		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="text-align: center;">INSURER(S) AFFORDING COVERAGE</td> <td style="text-align: center;">NAIC #</td> </tr> <tr> <td>INSURER A : Great Northern Insurance Co.</td> <td></td> </tr> <tr> <td>INSURER B : Federal Insurance Company</td> <td></td> </tr> <tr> <td>INSURER C :</td> <td></td> </tr> <tr> <td>INSURER D :</td> <td></td> </tr> <tr> <td>INSURER E :</td> <td></td> </tr> <tr> <td>INSURER F :</td> <td></td> </tr> </table>	INSURER(S) AFFORDING COVERAGE	NAIC #	INSURER A : Great Northern Insurance Co.		INSURER B : Federal Insurance Company		INSURER C :		INSURER D :		INSURER E :		INSURER F :	
INSURER(S) AFFORDING COVERAGE	NAIC #															
INSURER A : Great Northern Insurance Co.																
INSURER B : Federal Insurance Company																
INSURER C :																
INSURER D :																
INSURER E :																
INSURER F :																

COVERAGES **CERTIFICATE NUMBER:** **REVISION NUMBER:**

THIS IS TO CERTIFY THAT 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. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> GENERAL LIABILITY <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC			35287522	10/1/2013	10/1/2014	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 1,000,000
							MED EXP (Any one person)	\$ 10,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ Included
B	<input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS			73022950	10/1/2013	10/1/2014	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$			79660048	10/1/2013	10/1/2014	EACH OCCURRENCE	\$ 10,000,000
							AGGREGATE	\$ 10,000,000
								\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y / N <input type="checkbox"/>	N / A	70219818	10/1/2013	10/1/2014	<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

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER Cleveland Heights-University Heights City School District 2155 Miramar Boulevard University Heights, OH 44118-	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
--	--



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
11/6/2013

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PRODUCER The James B. Oswald Company 1100 Superior Avenue, Suite 1500 Cleveland OH 44114	CONTACT NAME: Vanetee S. Bayne	
	PHONE (A/C, No., Ext): 216-839-2800	FAX (A/C, No): 216-839-2815
E-MAIL ADDRESS: VBayne@oswaldcompanies.com		
INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A: Executive Risk Indemnity Inc.		35181
INSURER B:		
INSURER C:		
INSURER D:		
INSURER E:		
INSURER F:		

INSURED PROJE-3

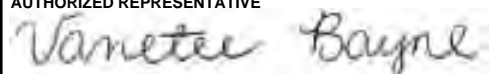
Project Management Consultants-
 Owner's Representative Services LLC
 3900 Key Center/127 Public Sq.
 Cleveland OH 44114-1291

COVERAGES **CERTIFICATE NUMBER:** 995408768 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT 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. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	GENERAL LIABILITY <input type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR _____ GEN'L AGGREGATE LIMIT APPLIES PER: <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 \$ _____ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ _____ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ _____ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N If yes, describe under DESCRIPTION OF OPERATIONS below						<input type="checkbox"/> WC STATU-TORY LIMITS <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Miscellaneous Professional E & O Claims Made	N		82218401	3/22/2013	3/22/2014	Each Claim \$1,000,000 Aggregate \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)

CERTIFICATE HOLDER Cleveland Heights-University Heights City School District 2155 Miramar Boulevard University Heights OH 44118	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE 

ALAS



ATTORNEYS' LIABILITY ASSURANCE SOCIETY, INC.,
A RISK RETENTION GROUP

January 10, 2013

VIA E-MAIL/U.S. MAIL

Thomas L. Feher, Esq.
Thompson Hine LLP
3900 Key Center
127 Public Square
Cleveland, OH 44114-1291

Re: Confirmation of Insurance for Thompson Hine LLP

Dear Tom:

Enclosed is the Confirmation of Insurance that you requested.

If you have any questions or require additional information, please feel free to contact me.

Sincerely,

A handwritten signature in cursive script that reads "Nancy Montroy".

Nancy J. Montroy
Vice President
Director of Underwriting

NJM:eo
Enclosure

311 South Wacker Drive, Suite 5700
Chicago, IL 60606-6629

tel 312-697-6900 fax 312-697-6901 Web site alas.com

ALAS



ATTORNEYS' LIABILITY ASSURANCE SOCIETY, INC.,
A RISK RETENTION GROUP

January 10, 2013

Thompson Hine LLP
3900 Key Center
127 Public Square
Cleveland, OH 44114-1291

To Whom It May Concern:

CONFIRMATION OF INSURANCE

We hereby confirm that Thompson Hine and Project Management Consultants LLC have Professional Liability Coverage under Policy ALA#1101 with an annual limit of \$40,000,000 per claim and \$80,000,000 in the aggregate with the right, under stated conditions, to purchase extended reporting rights upon termination of such Policy by ALAS.

The self-insured retention under such Policy is \$1,000,000 each claim up to an aggregate of \$2,000,000 and \$100,000 each claim thereafter.

The Policy effective date is from January 1, 2013 to January 1, 2014.

Such Policy is subject to the terms, conditions, limitations and exclusions stated therein.

**ATTORNEYS' LIABILITY ASSURANCE SOCIETY, INC.,
A RISK RETENTION GROUP**

By: Nancy Montroy Date: 1/10/2013

Nancy J. Montroy
Vice President - Director of Underwriting

311 South Wacker Drive, Suite 5700
Chicago, IL 60606-6629

tel 312-697-6900 fax 312-697-6901 Web site alas.com



Statement of Qualifications for Owner's Representative Services

22. project team structure •

Key Core Team




Our Owner' Representative Team structure:

Project Management Consultants LLC (PMC)
in association with
Regency Construction Services, Inc.

The contract will be held by Project Management Consultants LLC (PMC).

**Cleveland Heights University
Heights School District**

Project Delivery Presentation





Jeff Appelbaum
September 17, 2013

project
management
consultants llc


The Project Delivery System!

The Tool that Brings Order to the
Chaos of Construction



2

The Problem:



- Project Delivery Systems are often selected without objective analysis...and not tailored to solve project specific issues.
- For Ohio Public Construction, this was predetermined—until Construction Reform in 2012.
- Improper selection can lead to **project failure**

→



—Excuses:

- “The way we always did it”
- “What the Architect wanted”
- “The form we were told to use”

3

The Solution:

The Project Delivery Workshop



- Step 1: Educate owner regarding project delivery options
- Step 2: Review and prioritize critical project parameters
- Step 3: Identify absolute constraints that limit possible delivery options
- Step 4: Compare options based upon stakeholder priorities and select best approach
- Step 5: Implement special tools to enhance project delivery success

←

Step 1: Educate Owner



Explain Project Delivery Options, including "Typical" Advantages and Disadvantages of Each

- Design-Bid-Build
 - Single Prime
 - Multiple Prime
- Construction Management
 - As Adviser
 - As Adviser with GMP as Financial Accomodation
 - As Constructor (CM at Risk)
- Design Build and EPC
 - Additional Methods
 - Bridging Methods
- Approaches



Quick Review

Historical Perspective

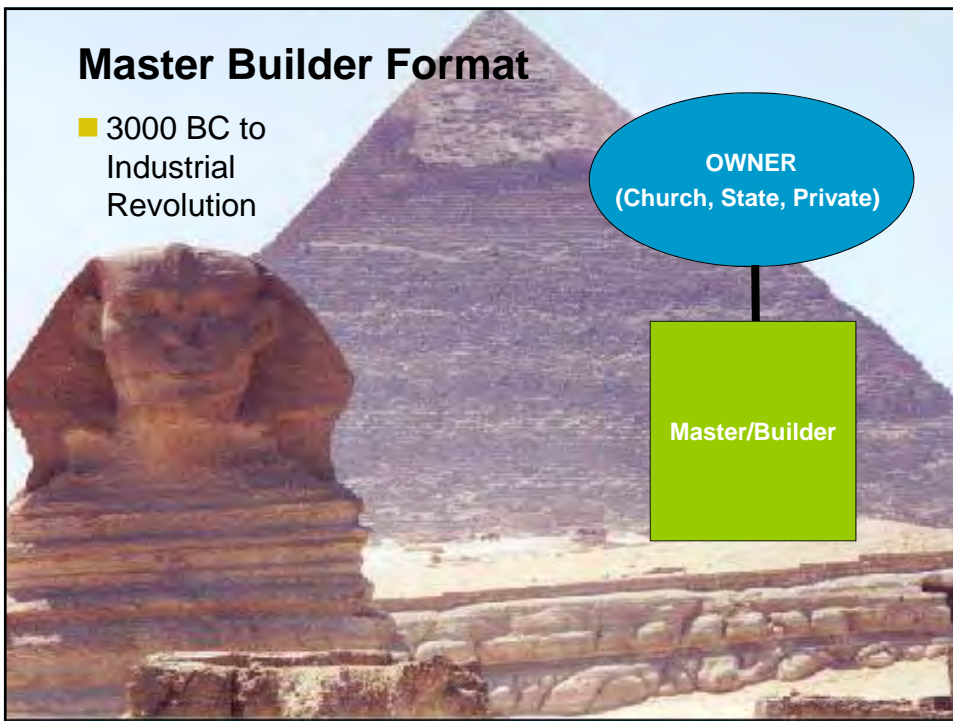
- 4000 Years of History in Three Minutes

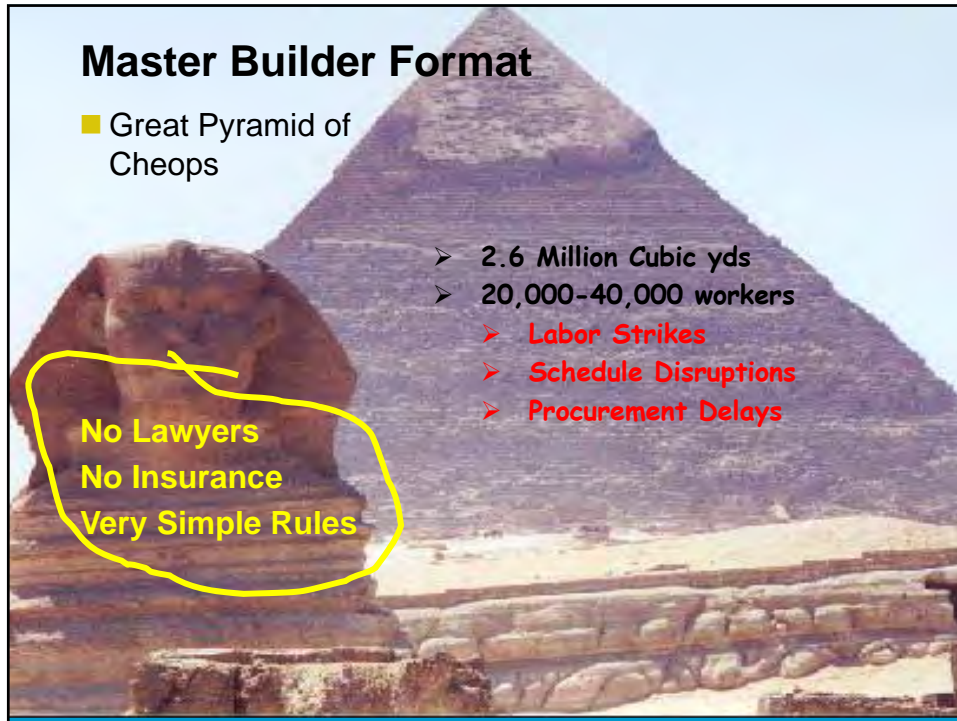


THOMPSON
HINE

Master Builder Format

- 3000 BC to Industrial Revolution



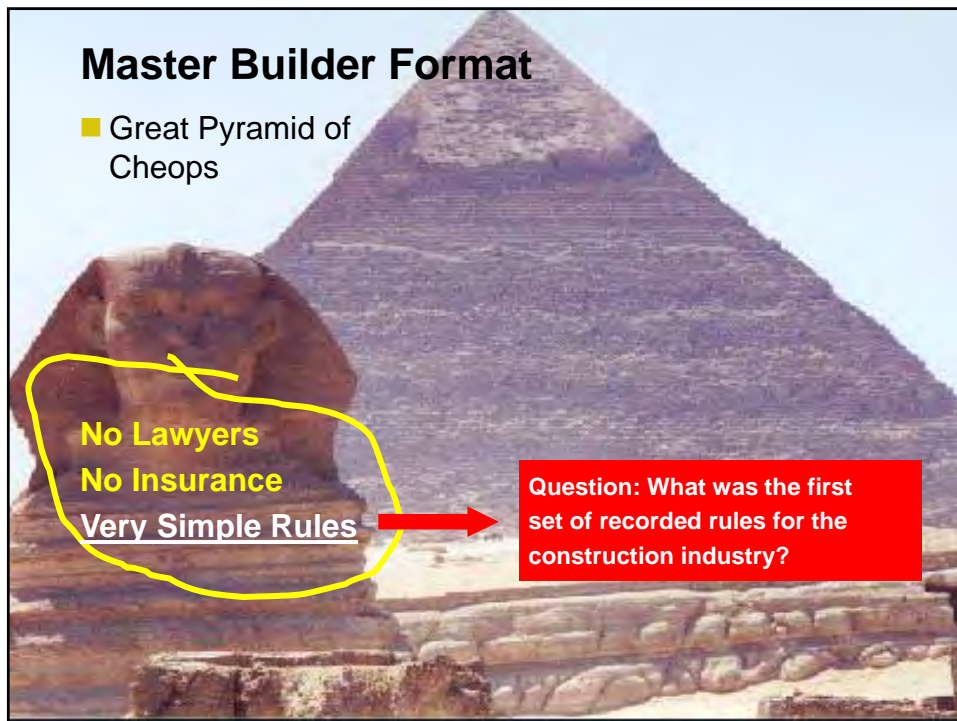


Master Builder Format

- Great Pyramid of Cheops

- 2.6 Million Cubic yds
- 20,000-40,000 workers
- Labor Strikes
- Schedule Disruptions
- Procurement Delays

No Lawyers
No Insurance
Very Simple Rules




Master Builder Format

- Great Pyramid of Cheops


No Lawyers
No Insurance
Very Simple Rules

Question: What was the first set of recorded rules for the construction industry?



THE HAMMURABI CODE

3000 BC



228: If a builder build a house for a man and complete it, that man shall pay him two shekels of silver per sar (approx. 12 sq. ft.) of house as his wage.

229: If a builder has built a house for a man and his work is not strong, and if the house he has built falls in an kills the householder, that builder shall be slain.

230: If the son of the householder be killed, the son of that builder shall be slain.

231: If the slave of the householder be killed, he shall give slave for slave to the householder.

232: If goods have been destroyed, he shall replace all that has been destroyed; and because the house was not made strong, and it has fallen in, he shall restore the fallen house of his own material.

233: If a` has built a house for a man, and his work is not done properly and a wall shifts, then that builder shall make that wall good with his own silver.

Payment (Cost plus)

Liability (including death penalties)

→ Good to be the daughter!

Note: All rules pertain to “Builder”–
When did that Change?

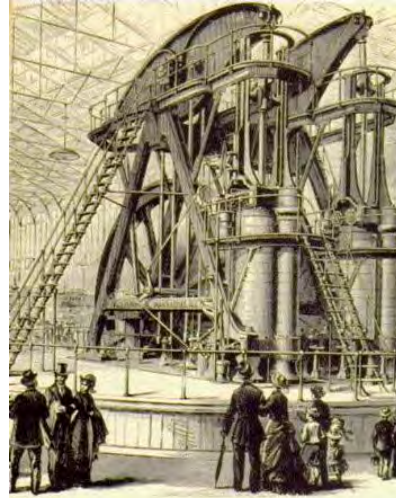


- Leon Battista Alberti (1443)
 - ▣ First Printed book on architecture, “*De re aedificatoria. On the art of building in ten books*”
 - ▣ Role of independent architect begins to emerge




Industrial Revolution

- 1750-1850
- Age of Specialization
- Decisions are Driven by Production and Cost
- Master Builder Separates into “Component Parts”



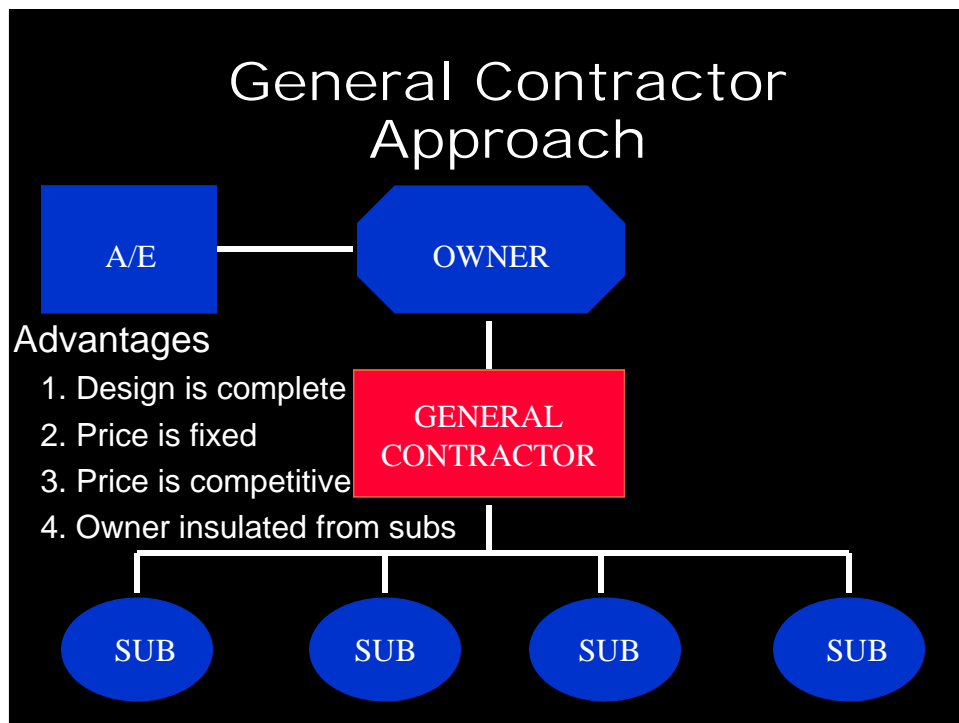
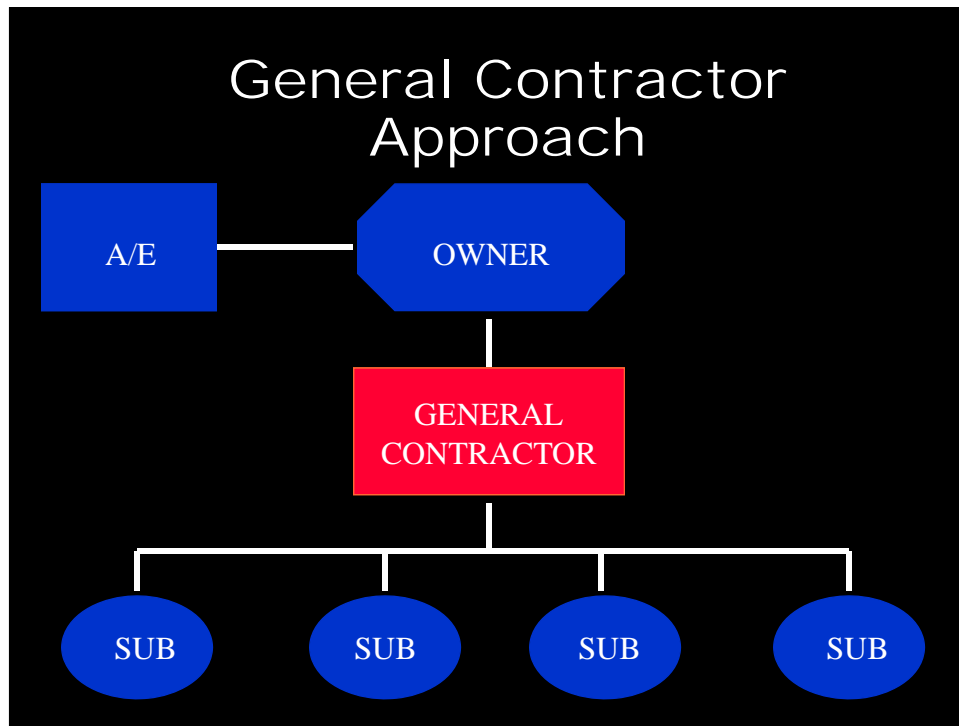
THOMPSON
HINE

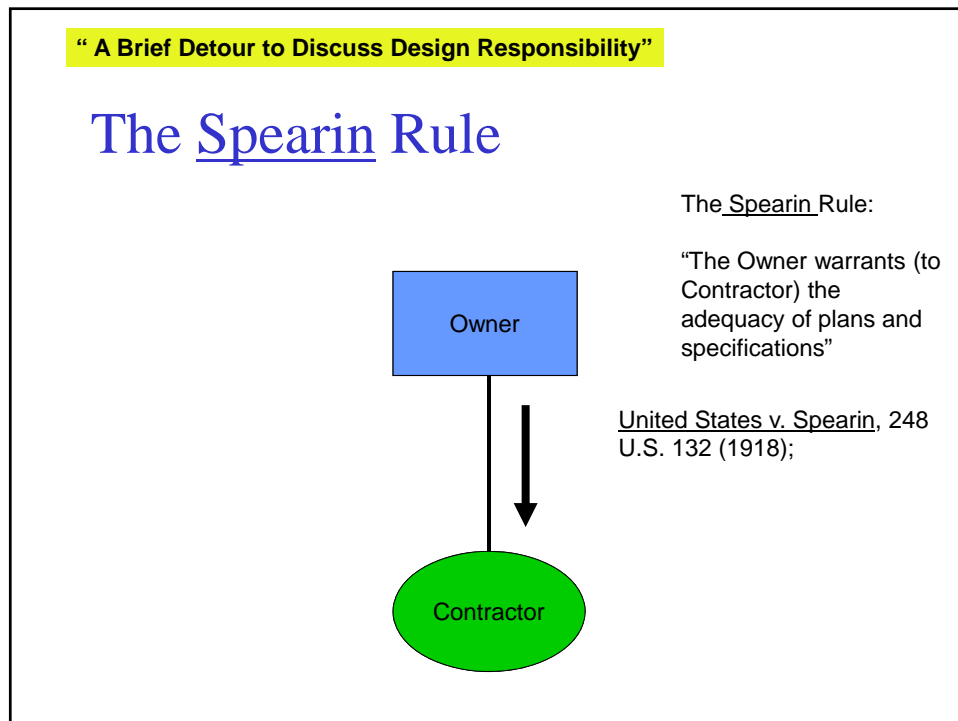
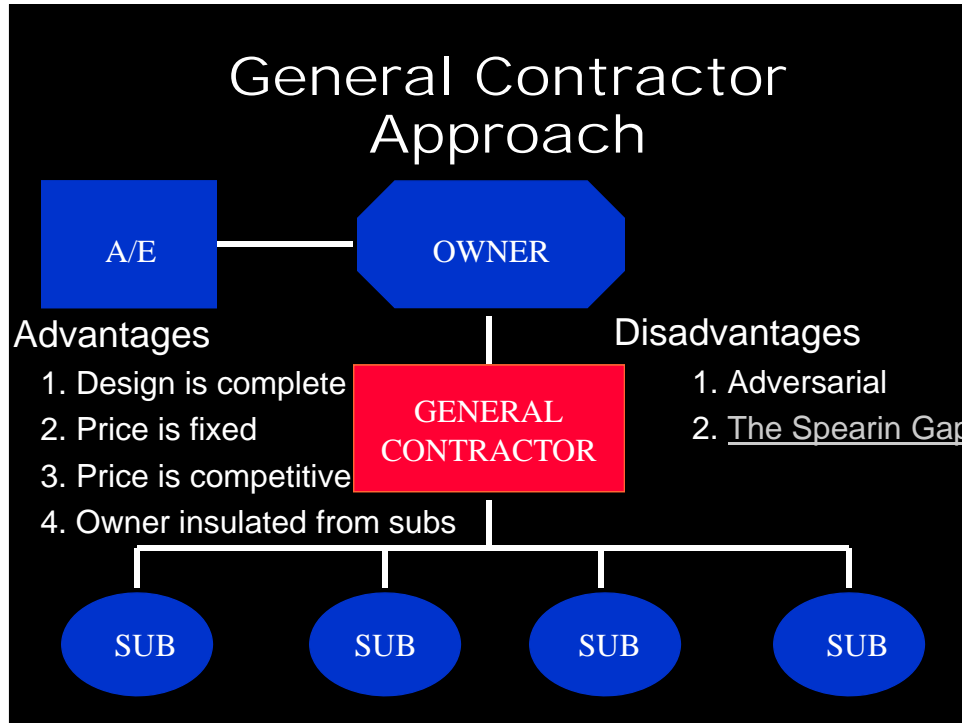
General Contractor Approach

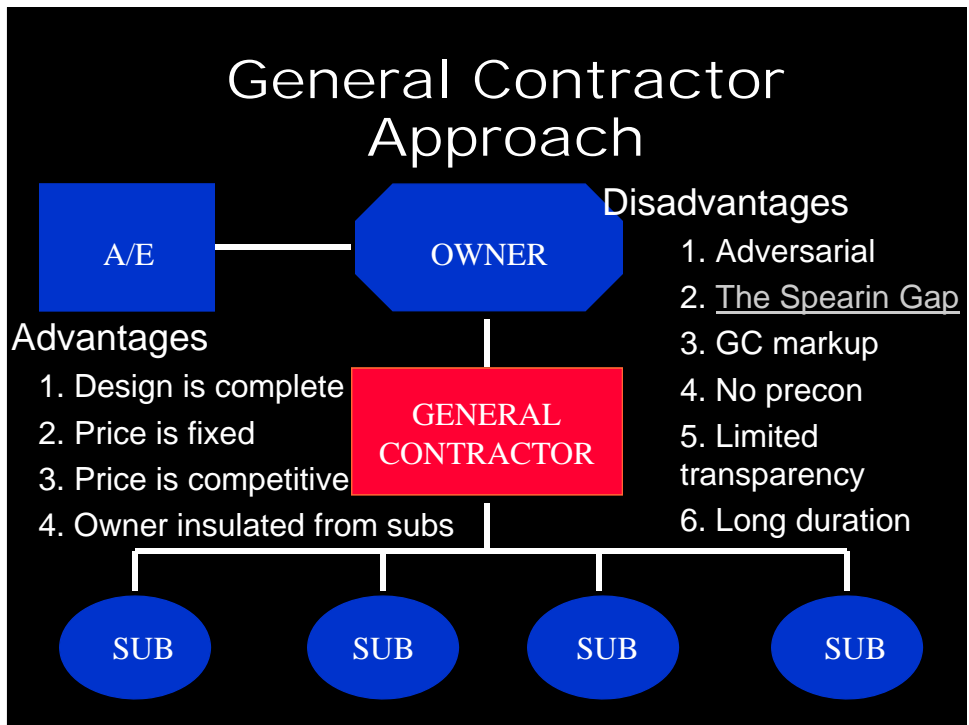
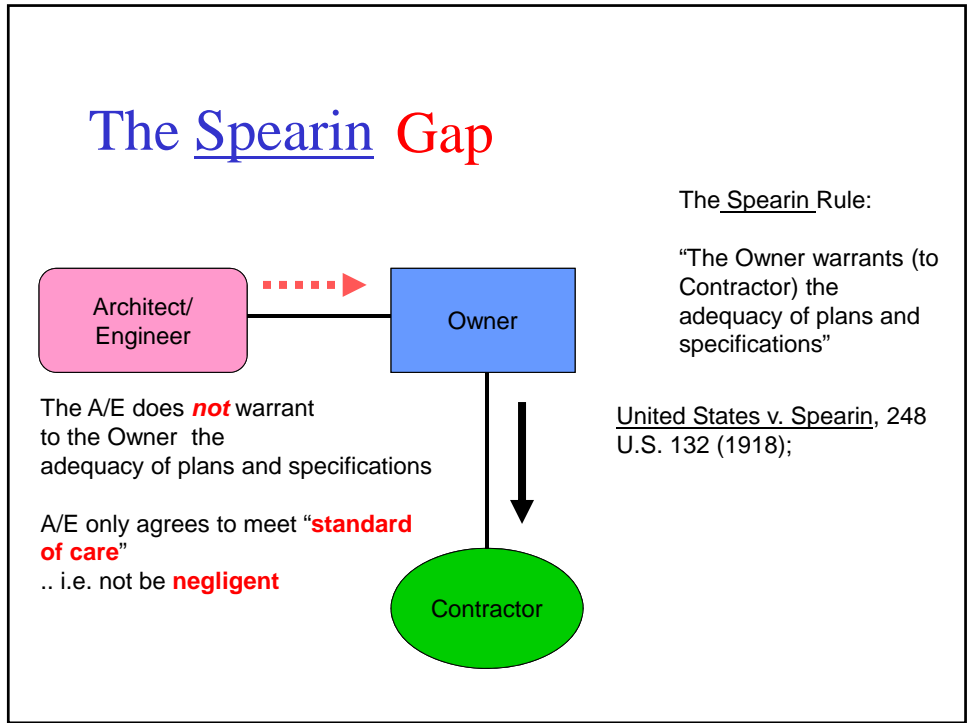


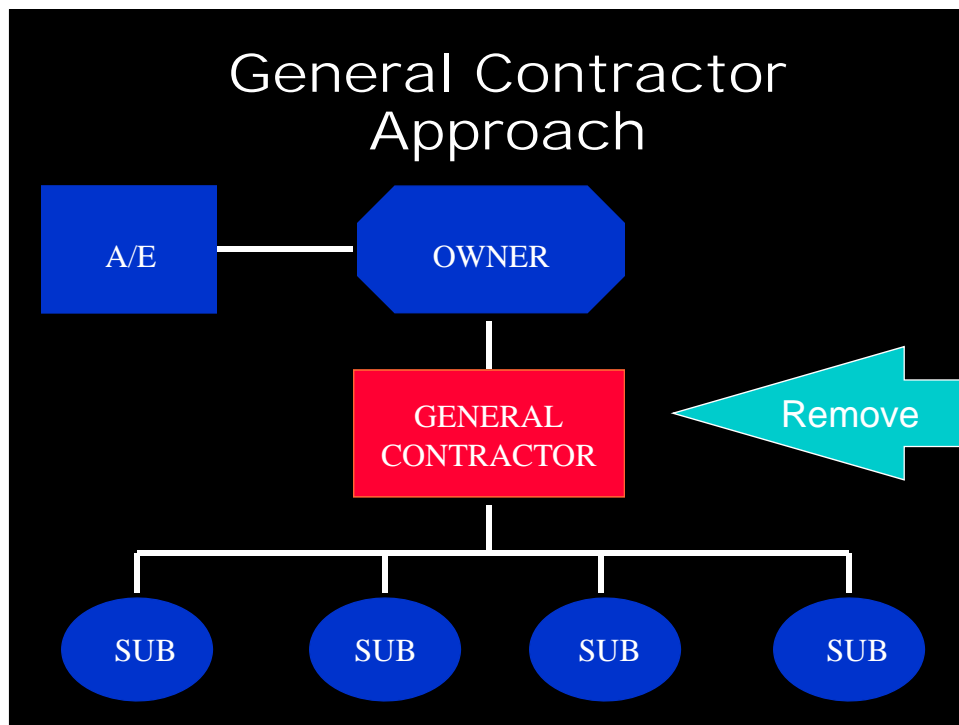
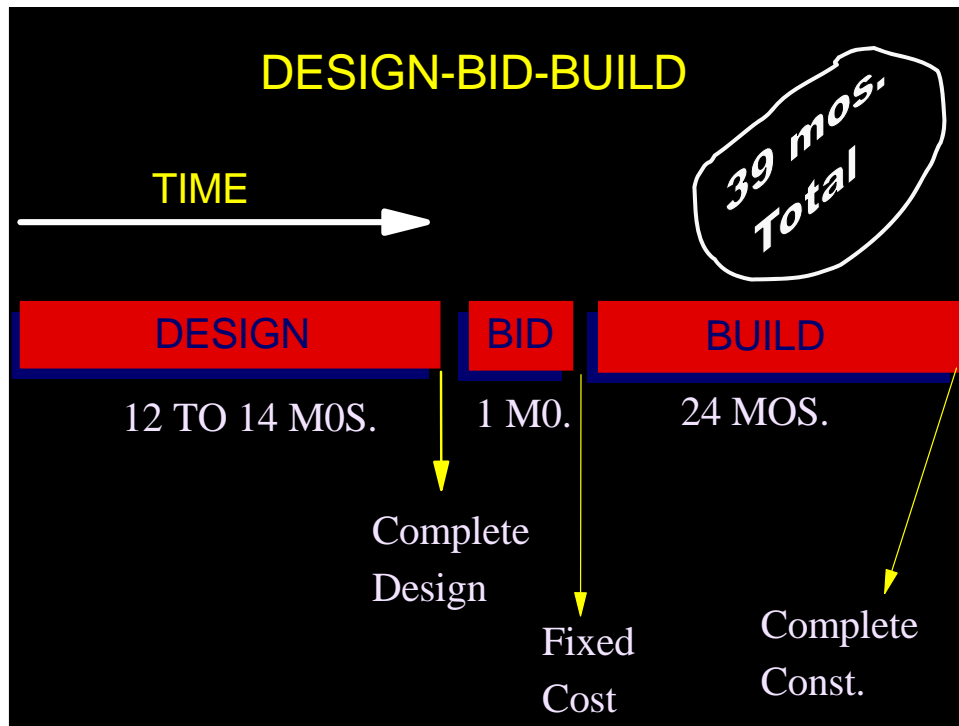
➤ A/E Scope

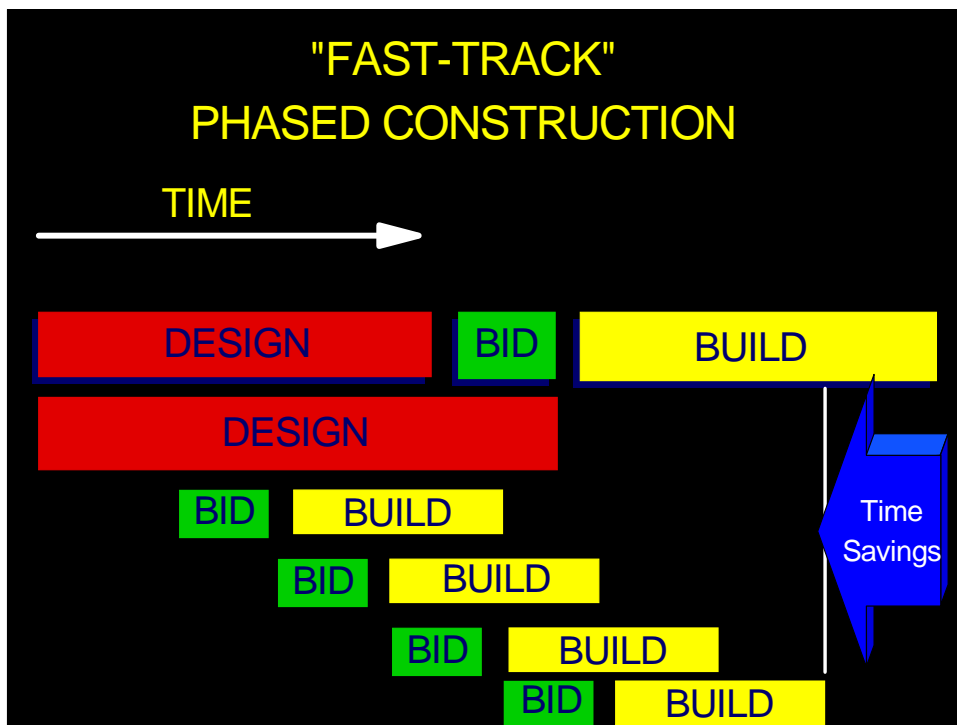
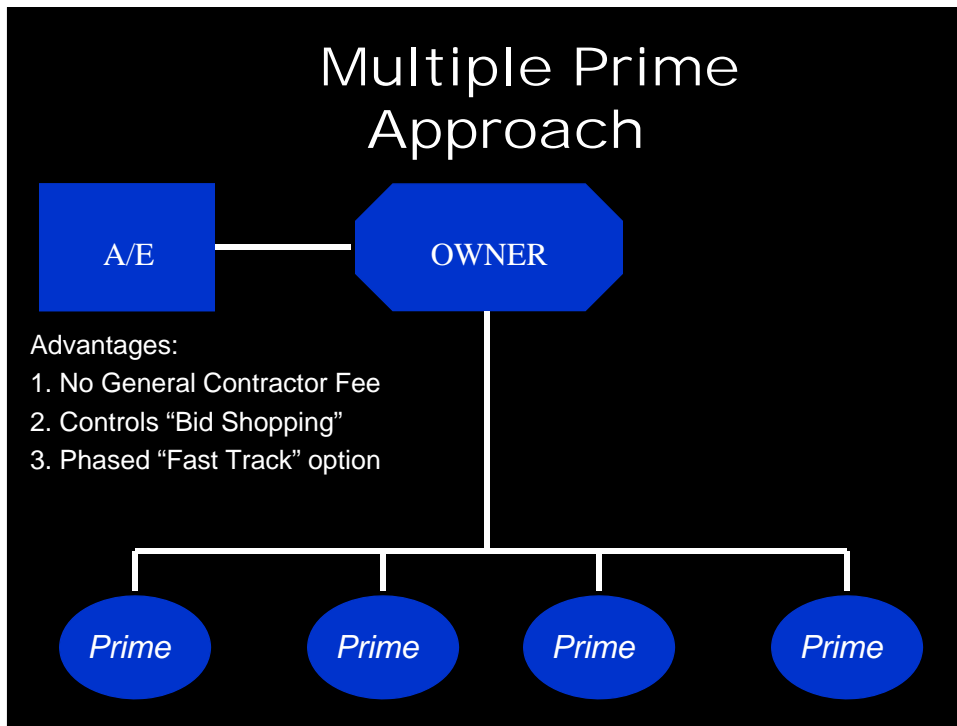
- ◆ Design Phases
 - Programming (5%)
 - Schematic Design (10%)
 - Design Development (20%)
 - Construction Documents (40%)
- ◆ Bidding (5%)
- ◆ Construction Administration (20%)

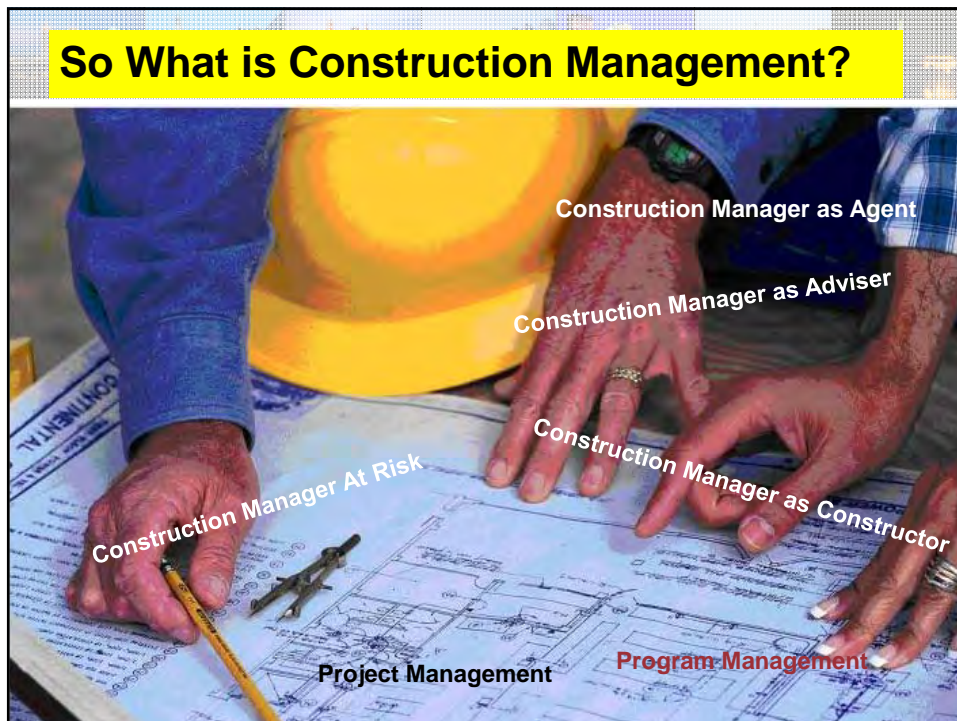
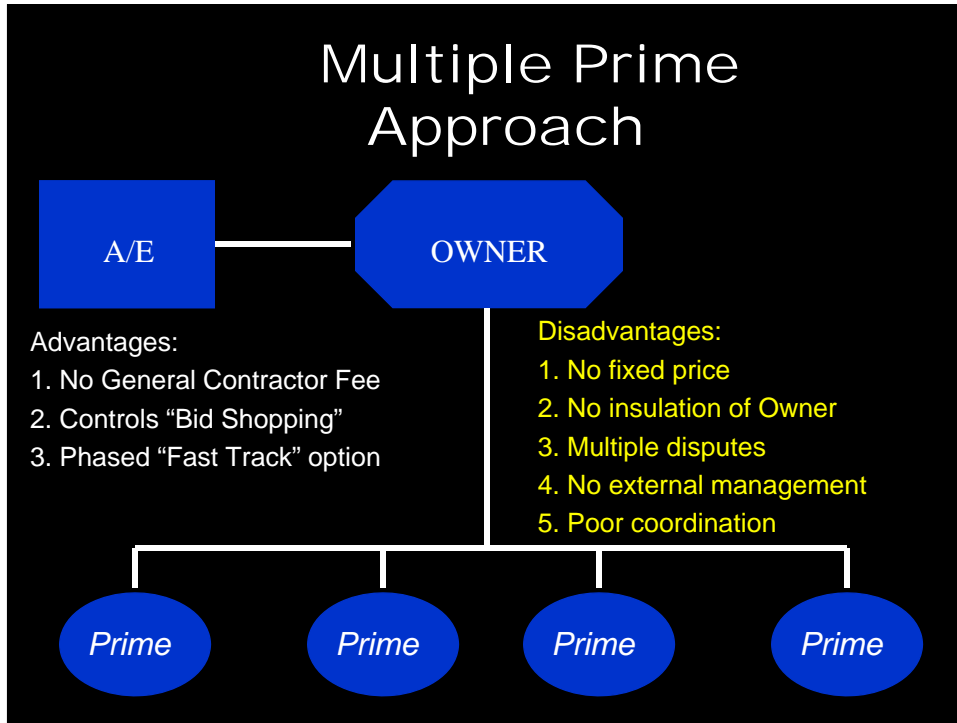












Some More History

- Washington Roebling is Engineer in Charge of Brooklyn Bridge
- Suffers crippling illness; confined to bed in Brooklyn
- Oversees work with field glasses
- Develops reliable management and tracking techniques for time, quality and budget
- Field Management/Direct Communications all handled by:



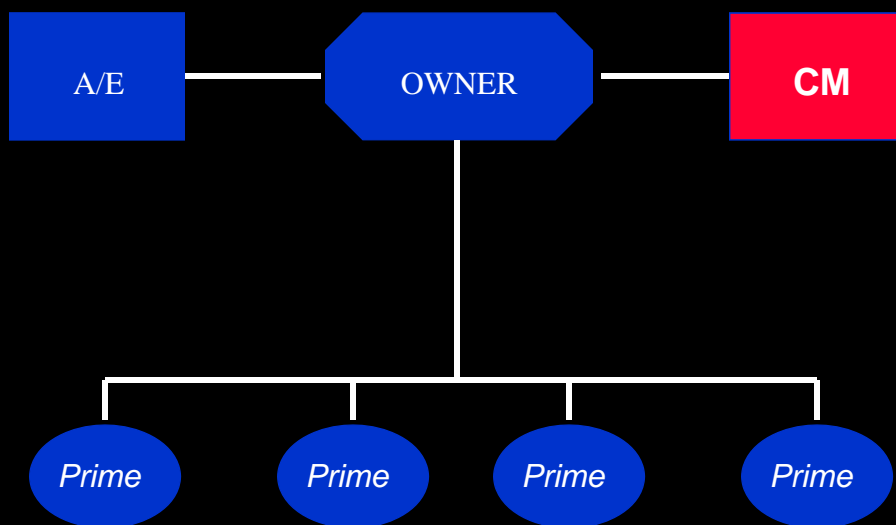
Washington Roebling

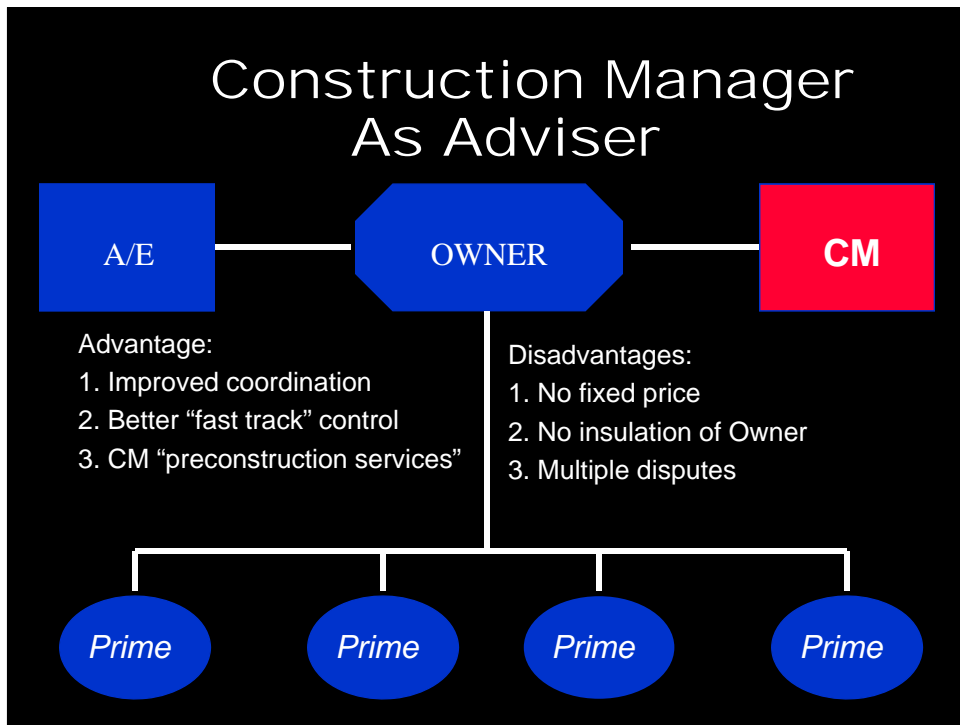
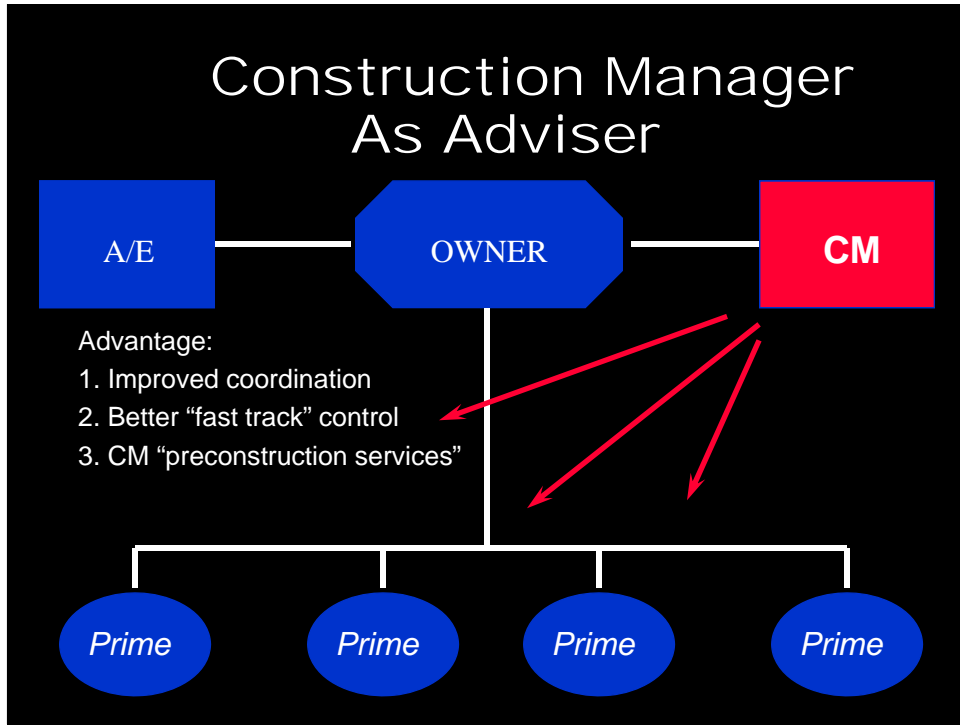


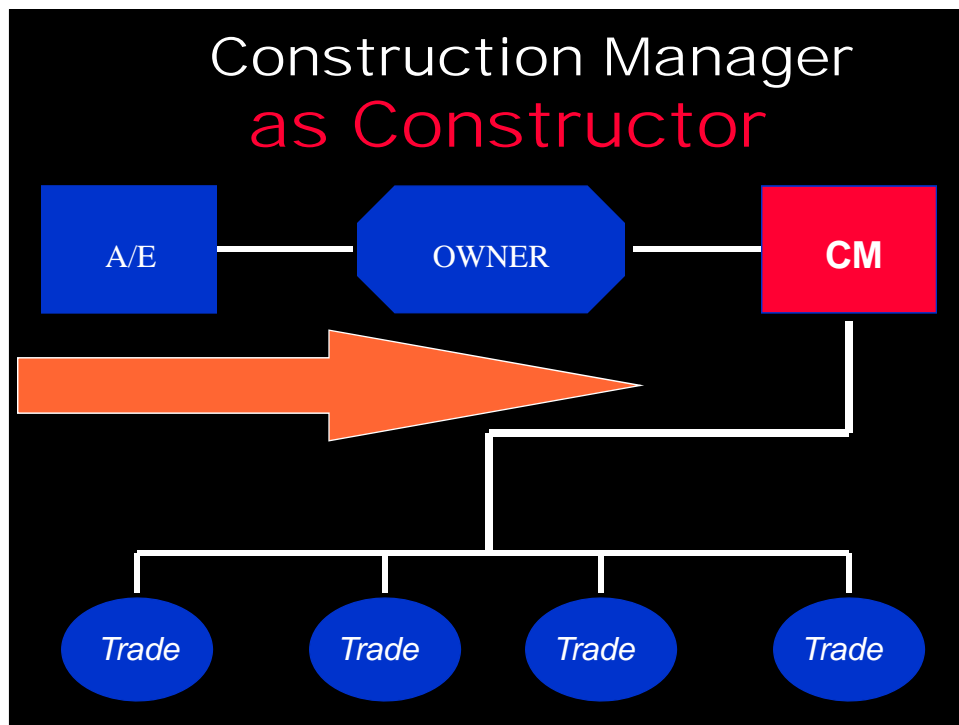
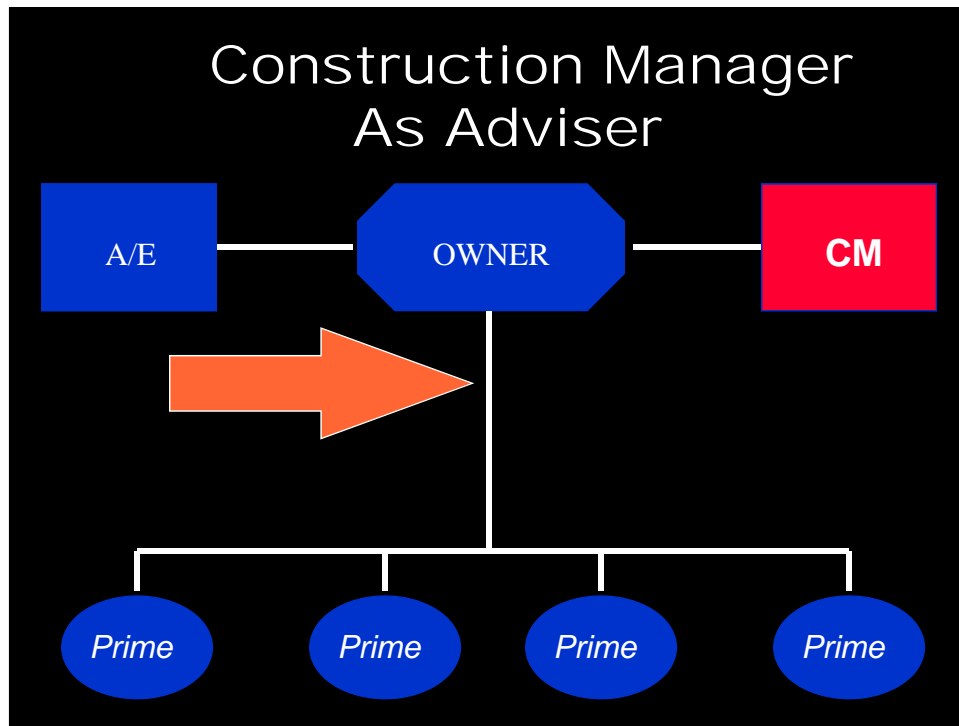
Elizabeth Warren Roebling



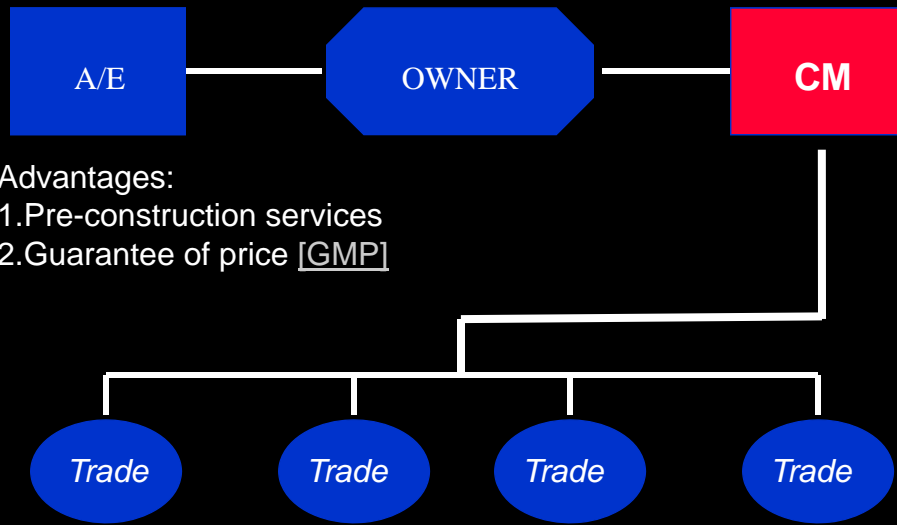
Construction Manager As Adviser







Construction Manager as Constructor



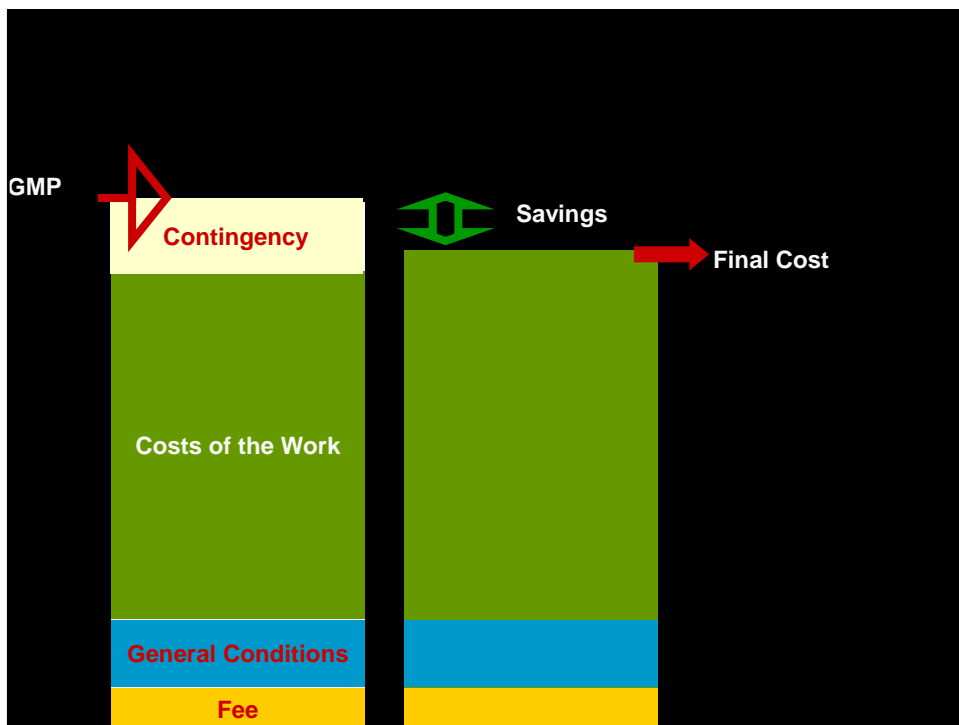
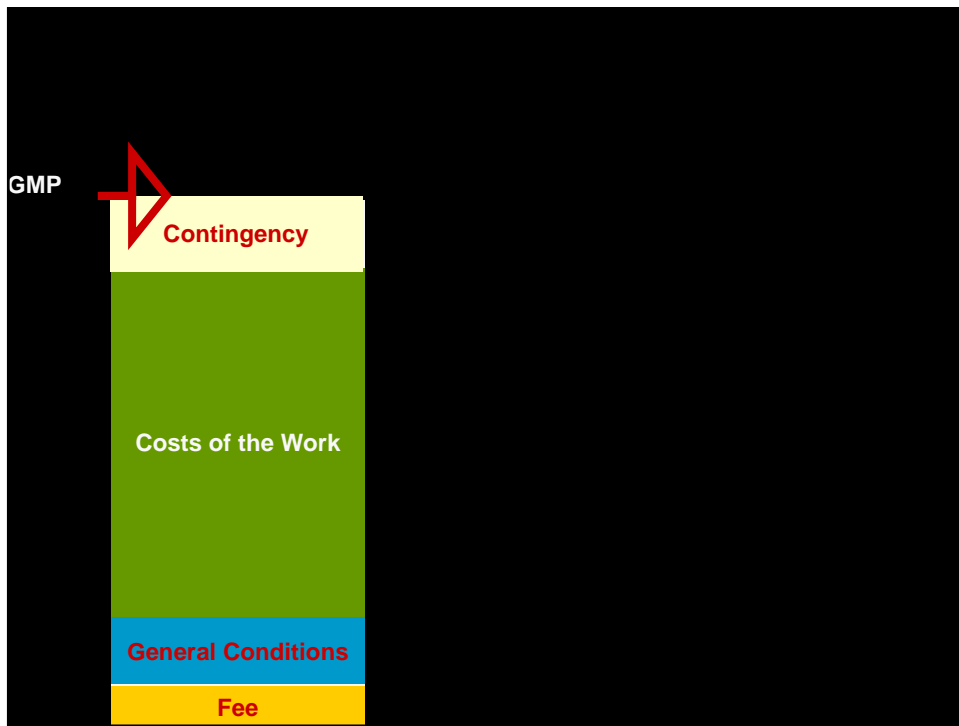
- Advantages:
1. Pre-construction services
 2. Guarantee of price [GMP]

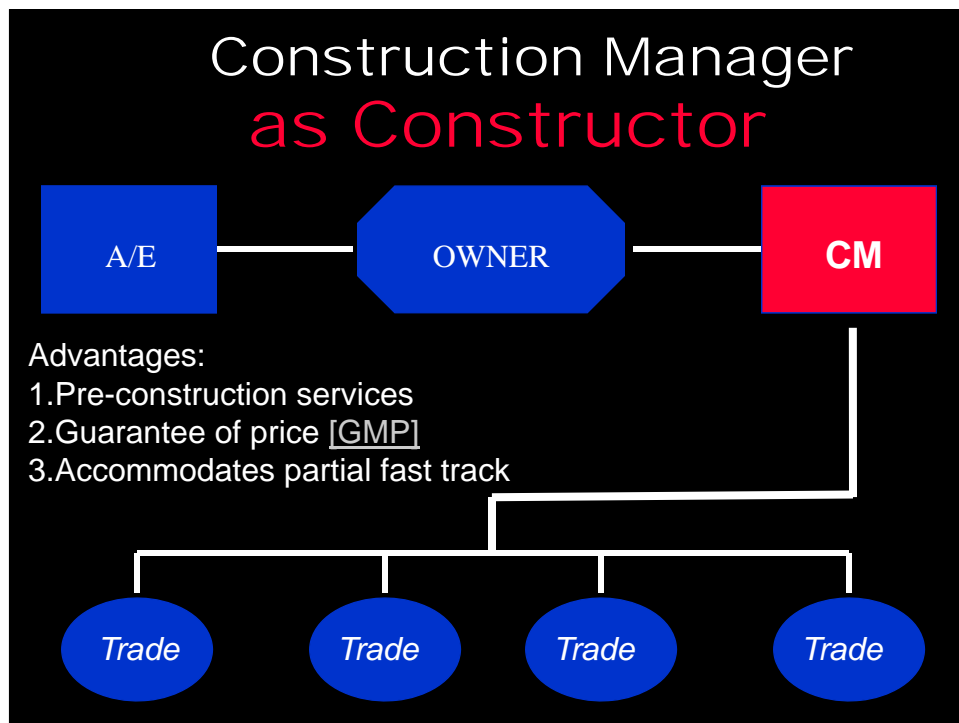
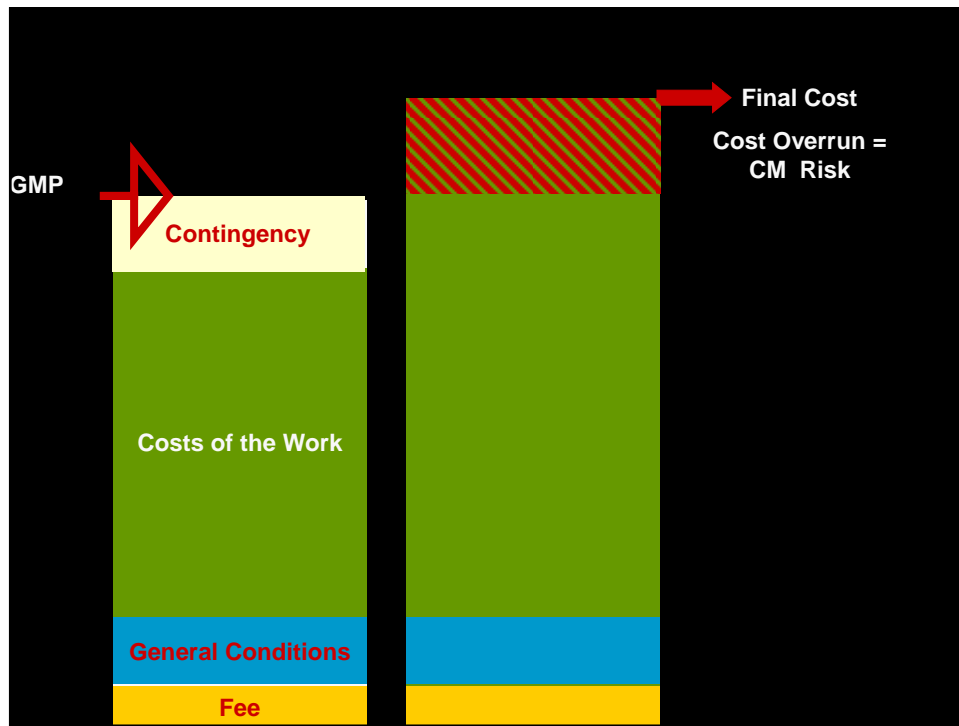
Lump Sum Pricing

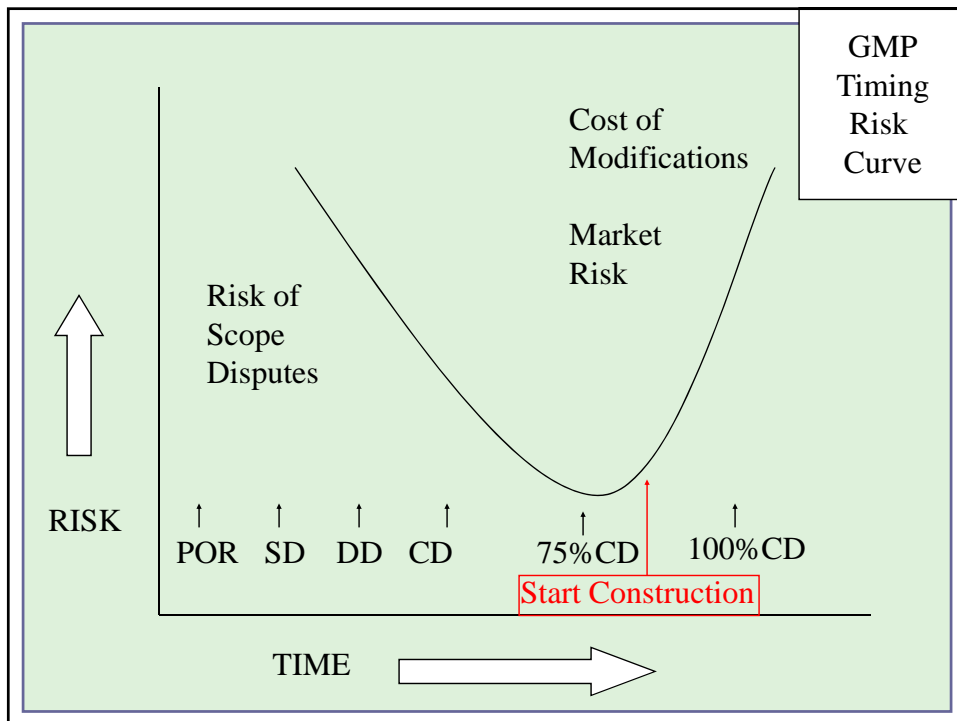
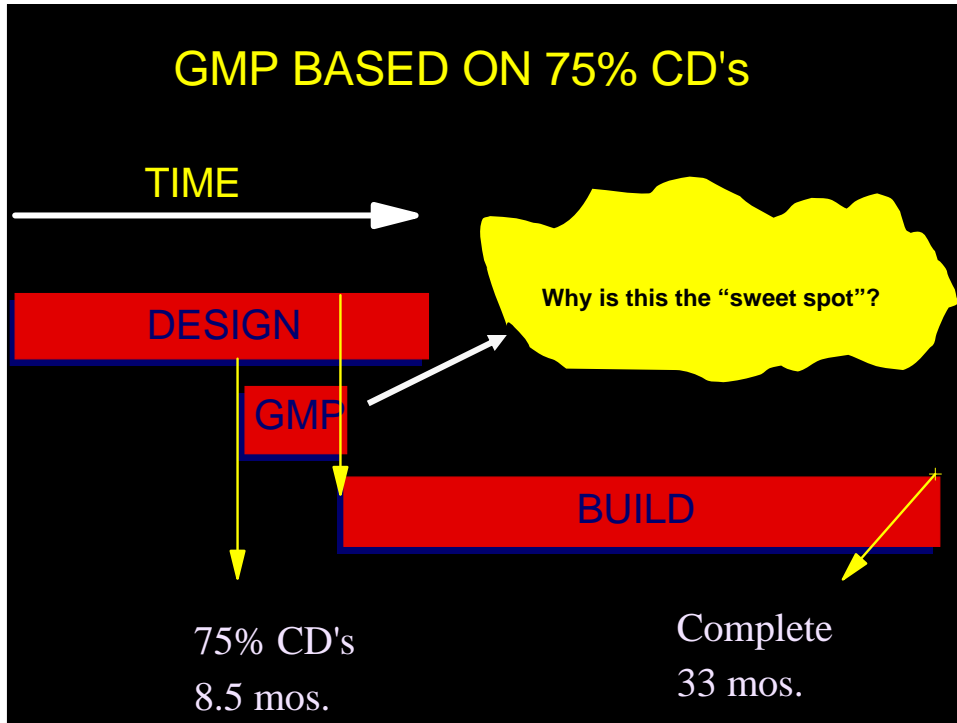


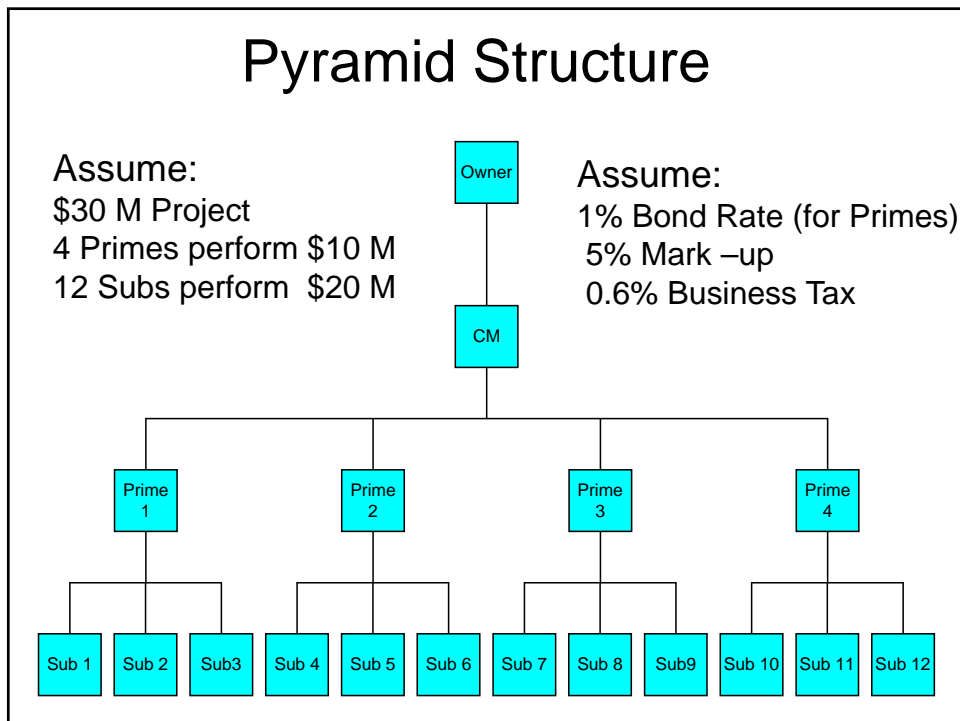
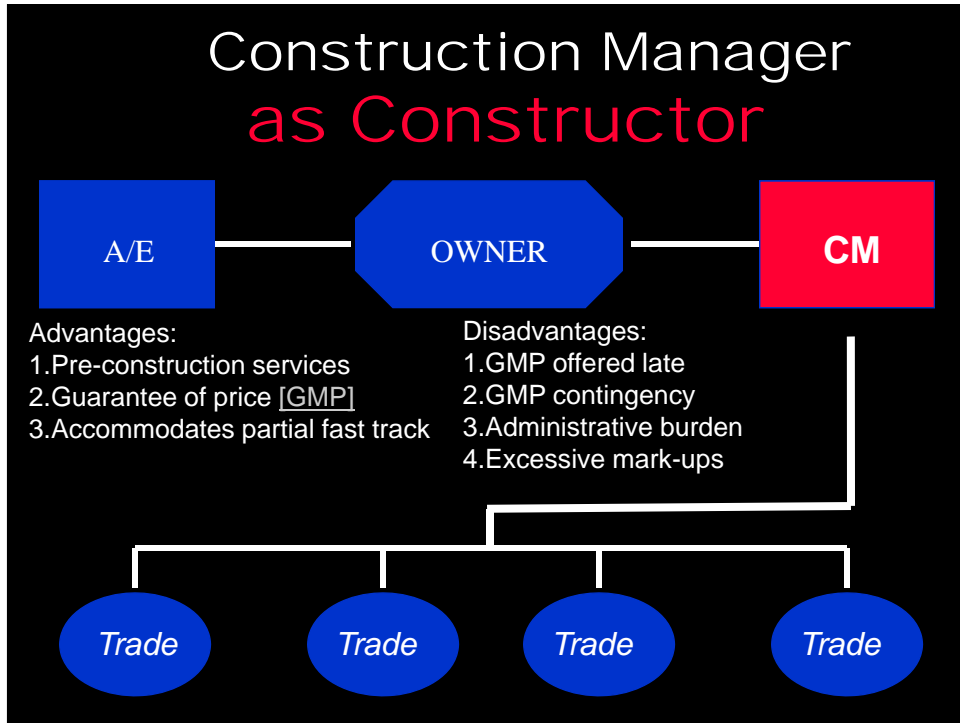
Lump Sum Pricing

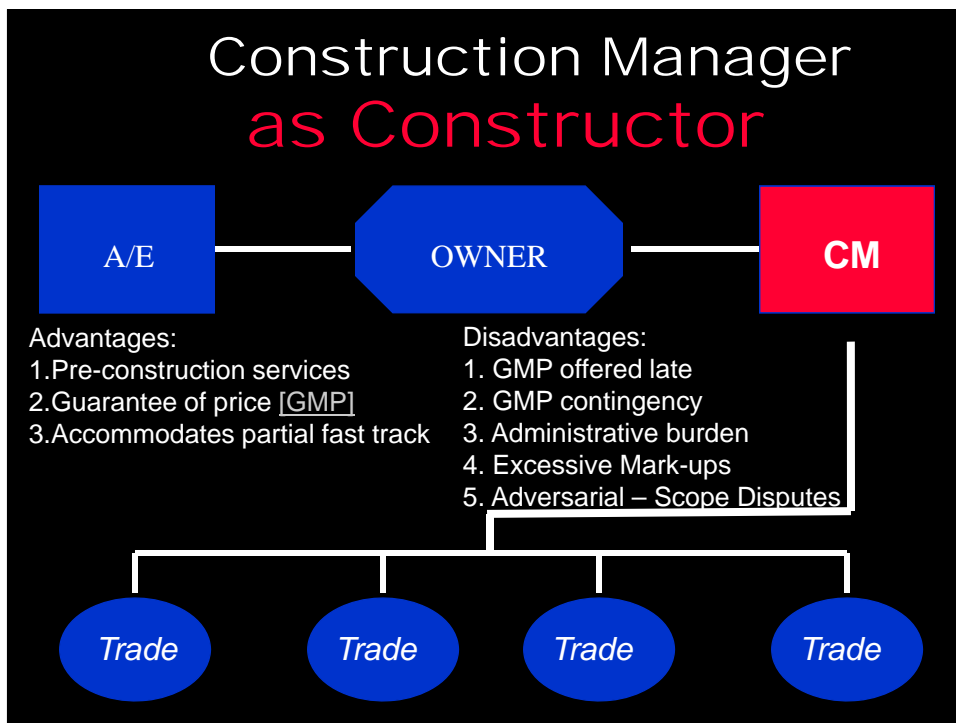
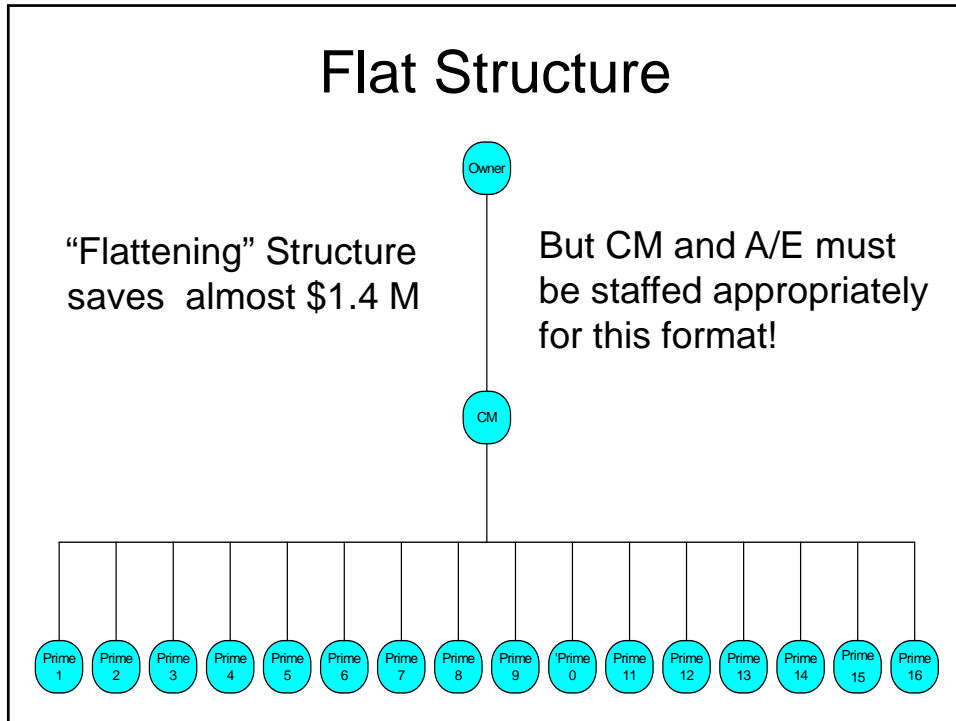
- No transparency
- Paid on percentage completion
- No Owner involvement or collaboration in pricing
- No opportunity for cost savings or managed contingency











An Approach to Avoiding GMP Scope Disputes

- ◆ The Facilitated GMP Approach or “Prose Process”



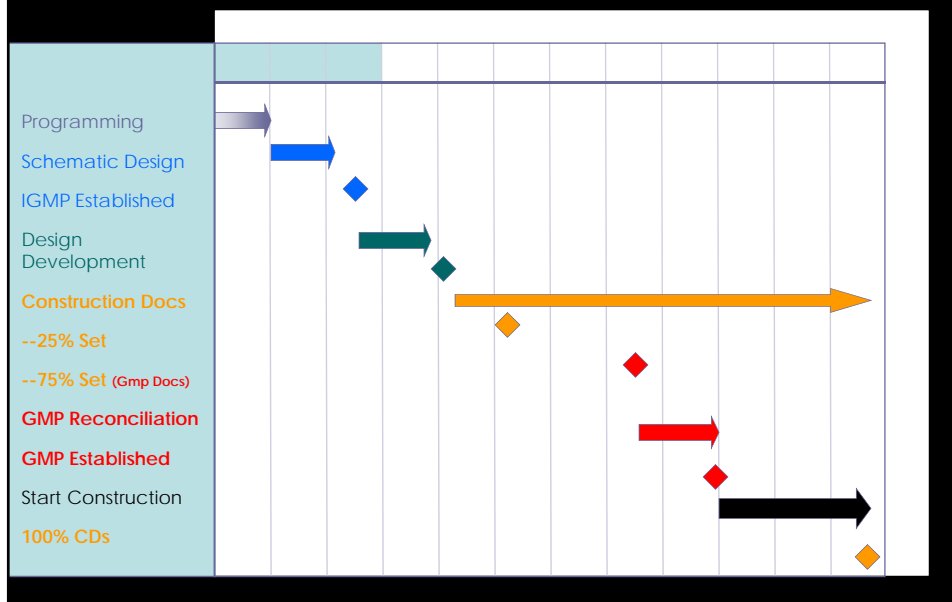
The GMP Scope Dispute

- ◆ The Usual Problem
 - Owner seeks GMP at 75% Complete Documents
 - CM offers GMP with standard “Qualifications and Assumptions”
 - When final CDs are issued, CM claims “new scope”--demands extras
 - Owner and A/E claim scope “reasonably inferable” from GMP documents--deny extras
 - Dispute Arises – substantial overrun potential

A Solution--The Facilitated GMP

- ◆ Well Defined GMP Documents
- ◆ “Prose Statement” Delivered with GMP Documents
- ◆ Initial Q&A Based on Prose Statement
- ◆ Facilitated GMP Session
- ◆ Sign-Off on Revised GMP Documents, Prose Statement and Q&A Statement
- ◆ Disputes Resolved by Facilitation
- ◆ Contingency Management Plan

Standard CM@Risk GMP Timeline



CM Contingency Management

- Initial Negotiated GMP Contingency
- Buyout Adjustments
 - Minus Buyout Losses
 - Plus Buyout Savings
- Agreed Reduction after Buyout and Foundations
 - 3% + Indicated Claims
- Available for Planned Add-Alternates

\$10M (4%)	<u>Add Alt Priority List</u>
-1.2M	1. Terrazzo \$2.4M
<u>+5.4M</u>	2. Carpet Extra .5
14.2M	3. Landscape 1.5
<u>-7.5M (3%)</u>	4. Lighting .6
\$6.7M	5. Sound Package 1.7

Conclusion of Part I

