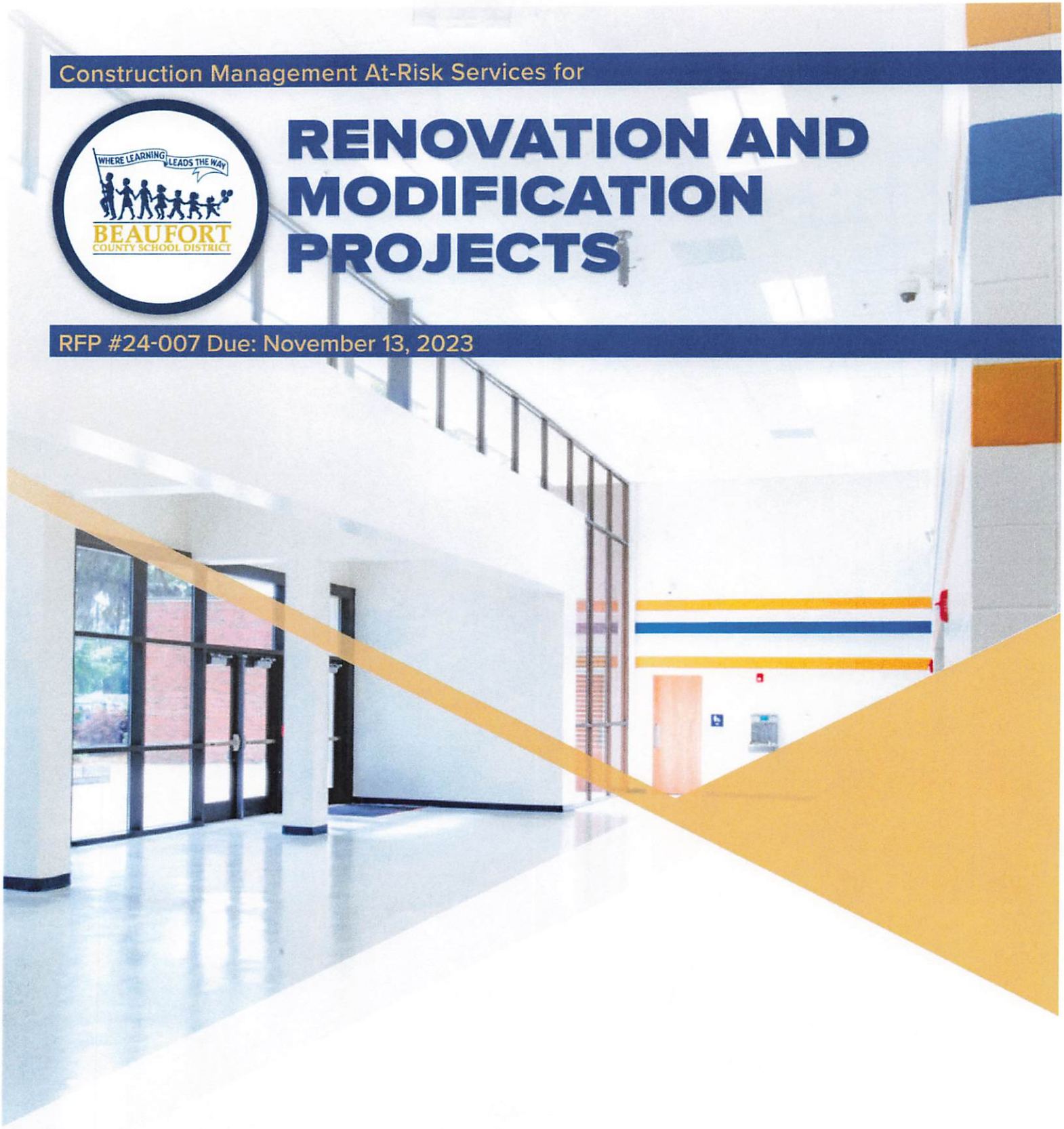
Construction Management At-Risk Services for

RENOVATION AND MODIFICATION PROJECTS

RFP #24-007 Due: November 13, 2023



CONTACT
DAVID HAMILTON, VP / Regional Manager
david.hamilton@cppi.com
1464 E. Victory Drive
Savannah, GA 31404
(912) 232-4544
www.cppi.com

CPPI
CHARLES PERRY PARTNERS, INC

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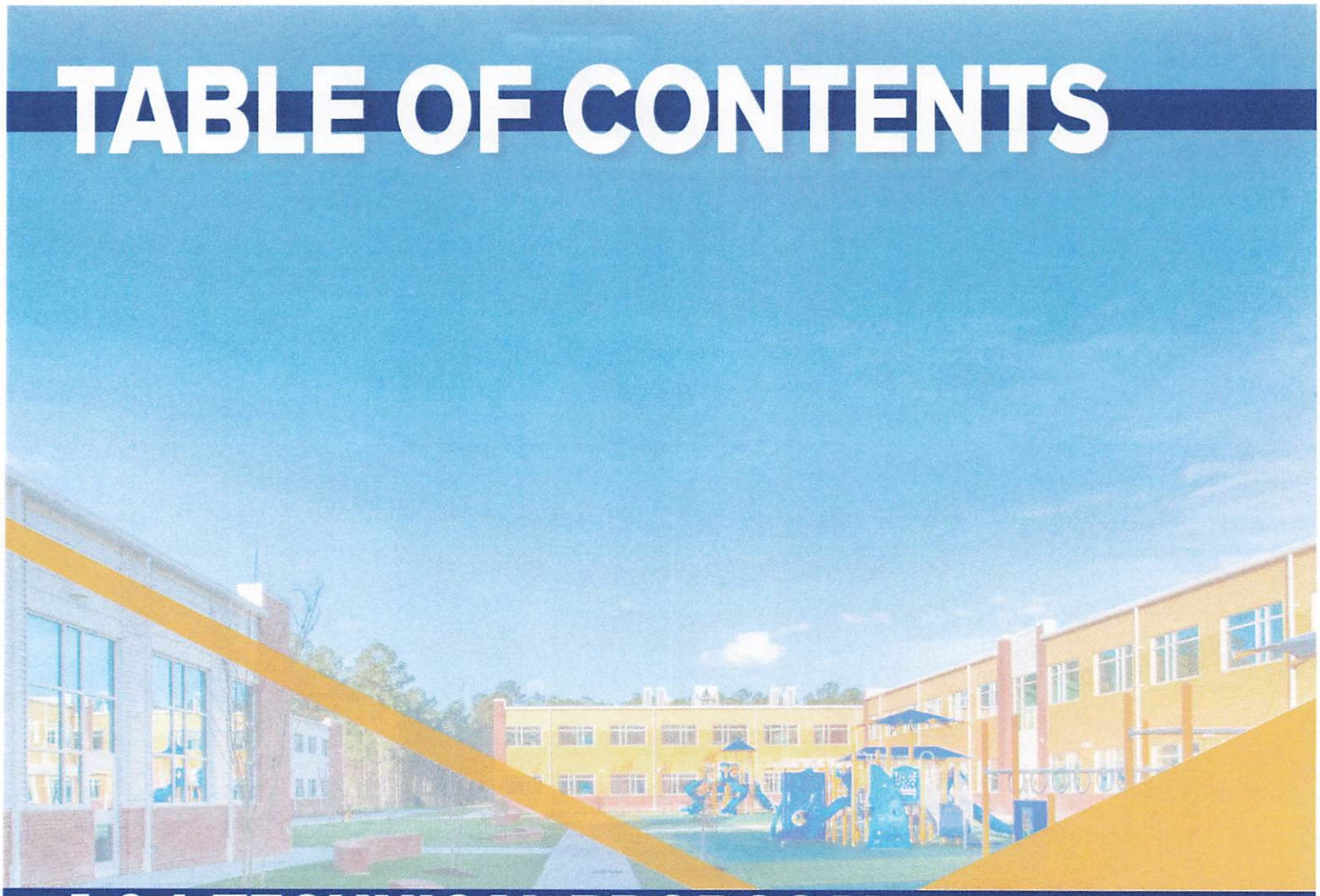

4.0.1 TECHNICAL PROPOSAL

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CPPI

Beaufort County School District

Solicitation Number:	24-007
Date Printed:	September 25, 2023
Date Issued:	TBD
Procurement Officer:	Kaylee Yinger, NIGP-CPP,CPPB
Phone:	843-322-2349
Email:	Kaylee.Yinger@beaufort.k12.sc.us

Request for Proposals (RFP)

DESCRIPTION: **Construction Management at-Risk Services – Renovation and Modification Projects**
SUBMIT OFFER BY (Opening Date & Time): **November 13, 2023 @ 4:00 PM EST**
QUESTIONS MUST BE RECEIVED BY: **November 6, 2023**
NUMBER OF COPIES TO BE SUBMITTED: **Six (6) Original Signed Copies**

Offers must be submitted in a sealed package. Solicitation Number & Opening Date must appear on package exterior.

SUBMIT YOUR SEALED OFFER TO FOLLOWING ADDRESS VIA UPS, FEDEX, COURIER OR HAND DELIVER:

PHYSICAL ADDRESS:
Beaufort County School District
Procurement Office
2900 Mink Point Blvd
Beaufort, SC 29902

AWARDS & AMENDMENTS:
Award will be posted at the Physical Address stated above on or after **November 13, 2023.** The award, this solicitation, and any amendments will be posted at the following web address: http://beaufortschools.net.

You must submit a signed copy of this form with Your Offer. By submitting a proposal or bid, You agree to be bound by the terms of the Solicitation. You agree to hold Your Offer open for a minimum of ninety (90) calendar days after the Opening Date.

NAME OF OFFEROR: (Full legal name of business submitting the offer) — ENTITY TYPE:

Charles Perry Partners, Inc. — Corporation

Jason Morgan

AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above)

Jason Morgan — Executive Vice President | Principal

PRINTED NAME — TITLE

Instructions regarding Offeror's name: Any award issued will be issued to, and the contract will be formed with, the entity identified as the Offeror above. An offer may be submitted by only one legal entity. The entity named as the Offeror must be a single and distinct legal entity. Do not use the name of a branch office or a division of a larger entity if the branch or division is not a separate legal entity, i.e., a separate corporation, partnership, sole proprietorship, etc.

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(Return Page Two with Your Offer)

HOME OFFICE ADDRESS (Address for Offeror's home office/ Principal place of business):	NOTICE ADDRESS (Address to which all procurement and contract related notices should be sent):
8200 NW 15th Place Gainesville, FL 32606	1464 E. Victory Drive Savannah, GA 31404

PHONE NUMBER: 912.232.4544

EMAIL ADDRESS: jason.morgan@cppi.com

PAYMENT ADDRESS (Address to which payments will be sent):	ORDER ADDRESS (Address to which all purchase orders will be sent):
☐ Payment Address Same as Home Office Address ☒ Payment Address Same as Home Notice Address (check one only)	☐ Payment Address Same as Home Office Address ☒ Payment Address Same as Notice Address (check one only)

ACKNOWLEDGEMENT OF AMENDMENTS:	Amendment Number	Amendment Issue Date
Offeror acknowledges. receipt of amendments by indicating amendment number and its date of issue.	1	10.16.2023
	2	10.18.2023

MINORITY PARTICIPATION- Are you a Minority Business Enterprise: Yes ☐ No ☑
If yes, please include a copy of your certification.

Beaufort County School District

Addendum 1

Solicitation Number:	24-007
Date Printed:	October 16, 2023
Date Issued:	October 16, 2023
Procurement Officer:	Kaylee Yinger, NIGP-CPP,CPPB
Phone:	843-322-2349
Email:	Kaylee.Yinger@beaufort.k12.sc.us

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NAME OF OFFEROR: (Full legal name of business submitting the offer) — Charles Perry Partners, Inc.

ENTITY TYPE: Corporation

Jason Morgan

AUTHORIZED SIGNATURE (Person signing must be authorized to submit binding offer to enter contract on behalf of Offeror named above)

Jason Morgan — PRINTED NAME

Executive Vice President | Principal — TITLE

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PHONE NUMBER: 904.886.9902	
EMAIL ADDRESS: jason.morgan@cppi.com	

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Beaufort County School District

Addendum 2

Solicitation Number:	24-007
Date Printed:	October 18, 2023
Date Issued:	October 18, 2023
Procurement Officer:	Kaylee Yinger, NIGP-CPP,CPPB
Phone:	843-322-2349
Email:	Kaylee.Yinger@beaufort.k12.sc.us

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If yes, please include a copy of your certification.

ADDRESS
1464 E. Victory Drive
Savannah, GA 31404
www.cppi.com

PHONE
912.232.4544

FAX
912.495.5880

EMAIL
jason.morgan@cppi.com

February 23, 2023

Kaylee Yinger, NIGP-CPP, CPPB
Beaufort County School District
Procurement Office
2900 Mink Point Blvd.
Beaufort, SC 29902

RE: CONSTRUCTION MANAGEMENT AT-RISK SERVICES - RENOVATION AND MODIFICATION PROJECTS

Ms. Yinger and Members of the Selection Committee:

Charles Perry Partners, Inc. (CPPI) is pleased to submit our qualifications to Beaufort County School District for the CMAR Renovation and Modification Projects. Our team has a long and successful history of delivering K-12 education projects and will approach your project with the same level of care and commitment to deliver the school on or ahead of schedule and on or under budget. The goals of Beaufort County School District are our goals.

Over the course of 55 years, CPPI has established itself as an educational facility builder.

Diversity.

$850M K-12 EDUCATIONAL CONSTRUCTION

WE HAVE COMPLETED MORE THAN 90 MAJOR K-12 PROJECTS IN 28 SCHOOL DISTRICTS, INCLUDING 15+ GREENFIELD K-12 FACILITIES IN THE LAST 10 YEARS.

Moreover, as a proven partner currently providing contractor services for Beaufort County School District, our positive experience with the facilities team, and our regional K-12 team, we are well positioned to deliver this project. With this depth of experience and our strong management capabilities, we have an intrinsic understanding of what it will take to make this project a success.

Inclusion.

55 YEARS IN BUSINESS

Consider the following strengths of CPPI:

- Extensive corporate K-12 experience
- Elementary school experts
- Current working relationship with Beaufort County School District
- Proposed Project Team with BCSD experience
- 12 Contract Amendments under current CM Contract
- Performed work in multiple BCSD projects
- Currently working in 3 BCSD facilities
- Recent regional educational experience
- Proven track record of budget accuracy and schedule control
- Commitment to local community and diversity participation
- Strong financial capabilities and resources

Partnership.

200 TEAM MEMBERS

We are confident that our experience, expertise, and capabilities make CPPI the best choice to be your partner in delivering your project. CPPI also knows that part of delivering a successful project is ultimately supporting the students, families and surrounding community.

In closing, you have my personal commitment to bring our team's talented resources to this project and to provide the highest level of service. Together, we can drive success into the classrooms and assure the brightest future possible for BCSD students.

Sincerely,

Jason Morgan
Principal in Charge
Charles Perry Partners, Inc.
jason.morgan@cppi.com



FIRM NAME
Charles Perry Partners, Inc. (CPPI)

HEADQUARTERS ADDRESS
8200 NW 15th Place
Gainesville, FL 32606

SAVANNAH OFFICE ADDRESS
1464 E. Victory Drive
Savannah, GA 31404

2023 ENR TOP 400 CONTRACTORS

HISTORY OF CPPI
In 1968, Charles R. "Chuck" Perry established a tradition of excellence by providing an impressive array of services for public and private sector clients through Charles Perry Construction.

In 1996, as the market shifted and the construction management methodology became more popular, Chuck established PPI to better serve this client type. In 2009, the Perry family of companies established a Georgia office and hired local, knowledgeable management and personnel to complement its existing team and better serve the needs of the Georgia and South Carolina market.

In 2011, Charles Perry Partners, Inc. (CPPI) was created as a strategic merger of these companies, combining the expertise of its staff and the quality of its projects while maintaining the principles established by Chuck 43 years earlier.

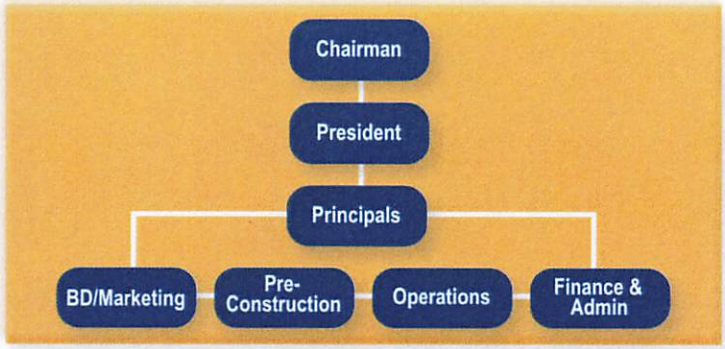
CPPI has staffed offices in Savannah, as well as Jacksonville, Gainesville, Orlando, Ft. Myers, Palm Beach, and Tampa, Florida.

CPPI's current ownership consists of four active principals with an average of more than 28 years of service with the firm. This ownership includes:

- Breck Weingart, Chairman | Principal - 40 Years with CPPI
- Brian Leslie, President | Principal - 30 Years with CPPI
- Jason Morgan, Executive VP | Principal - 20 Years with CPPI
- Vinnie Moreschi, Executive VP | Principal - 24 Years with CPPI

CPPI is a Construction Management, Design Build, and General Contracting firm with over 190 employees. The firm is a leader in sustainability and is dedicated to the communities in which it serves.

ORGANIZATIONAL STRUCTURE
CPPI's firm organizational structure consists of the following major components:



CONTACT INFORMATION FOR THE OFFICER OF THE FIRM IN CHARGE OF PROPOSAL

CPPI's Officer of the Firm in charge of this proposal is David Hamilton. He is a Vice President and Regional Manager for South Carolina and Georgia and has more than 34 years of construction experience. He will serve as the Project Executive for the Renovation and Modifications Projects.



DESCRIBE ANY COMPANY CHANGES THAT ARE ANTICIPATED TO OCCUR DURING THE LIFE OF THE PROJECT

CPPI does not anticipate any changes to occur during the life of the project.

OFFICE LOCATIONS

The Renovation and Modification Projects will be managed from CPPI's Savannah office, which is currently managing BCSD projects and has previously managed several projects in the past. Our office is locations are below:

Savannah Office
1464 E. Victory Drive
Savannah, GA 31404

Additional resources for the projects are always available from CPPI's additional offices.

CPPI Headquarters
8200 NW 15th Place
Gainesville, FL 32606

Jacksonville Office
12926 Gran Bay Parkway West, Suite 205
Jacksonville, FL 32258

Orlando Office
200 E. Palm Valley Drive, Suite 1040
Oviedo, FL 32765

Tampa Office
10150 Highland Manor Drive, Suite 135
Tampa, FL 33610

Fort Myers Office
8200 College Parkway, Suite 202
Fort Myers, FL 33919





CPPI PERSONNEL RESOURCES	
ROLE	**STAFF #**
Project Managers	79
Field Superintendents	60
Skilled Personnel	9
Estimators	12
MEP/FP / BIM / VDC	1
Executives	14
Principals	4
Admin / Marketing / Accounting	33
Safety Director	1
	213



"CPPI staff are dedicated to providing the highest quality to their clients at the best value. I would highly recommend them to any owner for any size construction projects"

Suzanne M. Wynn
Director of Community Planning
Alachua county Public Schools Facilities

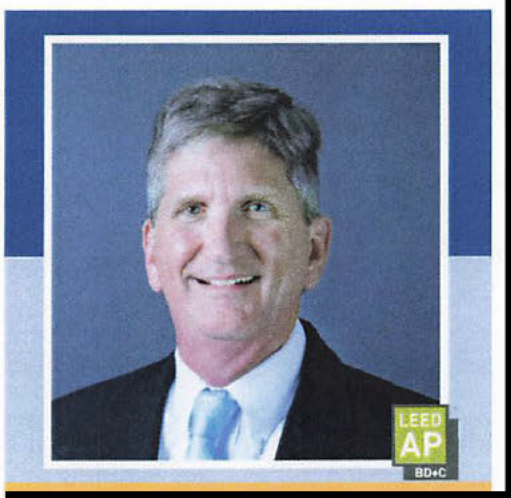
• Provide resumés describing your anticipated Project Team, along with their individual and team experience in projects similar in nature to the proposed project

JASON MORGAN PRINCIPAL IN CHARGE



[redacted]

DAVID HAMILTON PROJECT EXECUTIVE



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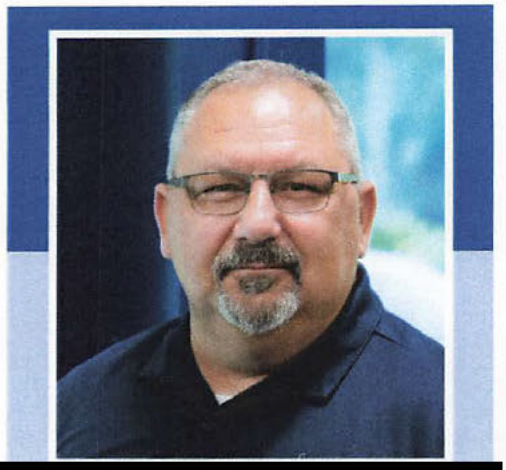
MATT MCCORMIC PROJECT MANAGER



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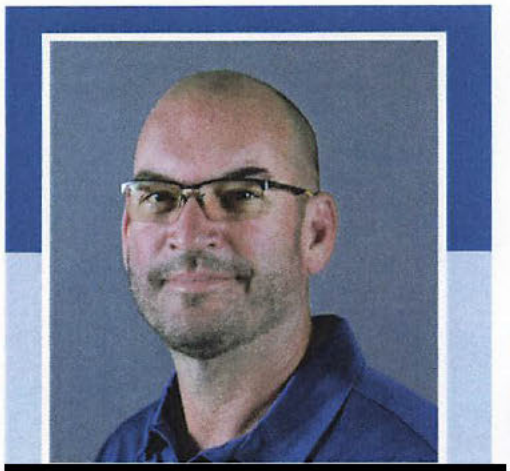
[redacted]

BOB BARNARD SENIOR SUPERINTENDENT



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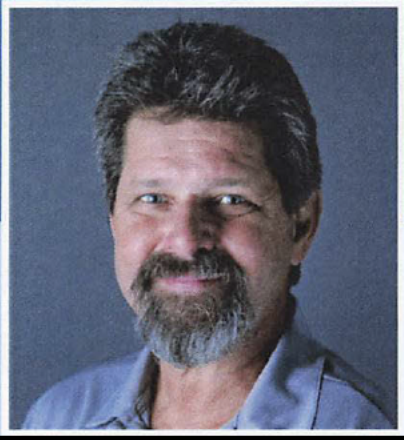
[redacted]

MIKE RIBAN SUPERINTENDENT



[redacted]

[redacted]

- Include an organizational chart identifying key individuals and their responsibilities

WHERE LEARNING LEADS THE WAY
BEAUFORT COUNTY SCHOOL DISTRICT

PRINCIPAL OVERSIGHT



Jason Morgan
Principal in Charge

CORE TEAM



David Hamilton
VP / Regional Manager



Matt McCormic
Project Manager



Bob Barnard
Senior Superintendent



Mike Riban
Superintendent

PRECONSTRUCTION



Jake Plein
VP of Preconstruction



David Lowe
Chief Estimator



Tucker Barnes
Preconstruction Engineer

SUPPORT



Lee Hall
MEPFP Coordinator / Cx



Austin Weingart
Safety Manager

CPPI support team is available for specific technical projects. They will not add cost to the project unless they bring value to the team. This is an in-house service that allows us to rapidly respond to complex projects and act as a consultant and not just another contractor.

- Include an organizational chart identifying key individuals and their responsibilities

CPPI is a full service construction manager with all of

the technical services needed to work with BCSD from preconstruction, through construction to the warranty period and beyond. We understand how important it is to help maximize every construction dollar to ensure that the original intent and scope of the project can be maintained.

KEY PROJECT TEAM MEMBERS	OPTIONS ANALYSIS	DESIGN REVIEW	BUDGET ESTIMATING	VALUE ENGINEERING	CONSTRUCTION SCHEDULING	QUALITY CONTROL	CONSTRUCTABILITY ANALYSIS	COST CONTROL	CHANGE ORDER NEGOTIATION	CLAIMS MANAGEMENT	PROJECT CLOSEOUT	TRANSITION PLANNING	SECURITY SYSTEMS
David Hamilton *VP / Regional Manager*	X	X	X	X	X	X	X	X	X	X	X	X	X
Matt McCormic *Project Manager*	X	X	X	X	X	X	X	X	X	X	X	X	X
Bob Barnard *Senior Superintendent*	X	X	X	X	X	X	X	X	X	X	X	X	X
Mike Riban *Superintendent*	X	X	X	X	X	X	X	X	X	X	X	X	X
David Lowe *Chief Estimator*	X	X	X	X	X	X	X	X					
SUPPORT STAFF													
Jason Morgan *Principal in Charge*	X	X	X	X	X	X	X	X	X	X	X	X	X
Jake Plein *VP of Preconstruction*	X	X	X	X	X	X	X	X					
Tucker Barnes *Preconstruction Coordinator*	X	X	X	X	X	X	X	X					
Lee Hall *MEPFP Coordinator / Cx*	X	X					X	X			X	X	
Austin Weingart *Safety Manager*					X						X		X

- Identify current team member obligations, project assignments, and the approximate percentage of time each team member will spend on this project during the different stages of the Project.

TEAM MEMBER	CURRENT OBLIGATIONS	PROJECT ASSIGNMENTS	PERCENTAGE OF TIME ON YOUR PROJECT
David Hamilton *VP / Regional Manager*	Regional Manager for all Georgia and South Carolina Projects - No Specific Assignment		Preconstruction: 25% Construction: 20% Post-Construction: 20%
Matt McCormic *Project Manager*	Beaufort County School District Multiple Contracts under current CMAR Master Contract Completion Date: January 2024		Preconstruction: 50% Construction: 100% Post-Construction: 50%
Bob Barnard *Senior Superintendent*	America's Second Harvest of Coastal Georgia Warehouse & Distribution Center Completion Date: January 2024 Beaufort County School District Whale Branch Early College HS Renovation Completion Date: January 2024		Preconstruction: 25% Construction: 20% Post-Construction: 25%
Mike Riban *Superintendent*	Beaufort County School District Multiple Contracts under current CMAR Master Contract Completion Date: January 2024		Preconstruction: 10% Construction: 100% Post-Construction: 10%
David Lowe *Chief Estimator*	Chief Estimator for all CPPI North Projects - No Specific Assignment		Preconstruction: 30% Construction: 10% Post-Construction: 0%
Jason Morgan *Principal in Charge*	Principal Oversight - No Specific Assignment		Preconstruction: 30% Construction: 30% Post-Construction: 30%
Jake Plein *VP of Preconstruction*	Preconstruction Oversight for all CPPI North Projects - No Specific Assignment		Preconstruction: 30% Construction: 10% Post-Construction: 0%
Tucker Barnes *Preconstruction Coordinator*	Preconstruction Coordination for Various Projects - No Specific Assignment		Preconstruction: 30% Construction: 10% Post-Construction: 0%
Lee Hall *MEPFP Coordinator / Cx*	MEPFP / Commissioning for all CPPI Projects - No Specific Assignment		Preconstruction: 30% Construction: 20% Post-Construction: 10%
Austin Weingart *Safety Manager*	Safety Manager for all CPPI Projects - No Specific Assignment		Preconstruction: 20% Construction: 30% Post-Construction: 10%

- Describe how the construction team would be organized throughout the life of the Project.
- Specifically identify your assigned Project Manager and possible Superintendents for the Project. Proposers shall propose a single Project Manager that will be assigned to all project sites. It is the intent of the District to have a single point of contact (per general contractor selected) for all project sites for pre-construction through completion of construction. The proposed Project Manager must be present at the RFP interviews, and the selected firm must commit to maintain the same persons as Project Manager for the entire duration of the Project.

WE BELIEVE IN A PROACTIVE APPROACH TO COMMUNICATION. THIS OPEN CHANNEL OF THOROUGH COMMUNICATION, COORDINATION & INVOLVEMENT IS INSTILLED AND ENCOURAGED IN ALL OF OUR TEAM MEMBERS.

ORGANIZATIONAL STRUCTURE

CPPI is comprised of a dedicated team of professionals specialized in education construction delivery.

Our management and leadership philosophies start with the Project Executives and Project Managers and are implemented by all supervisors. Our services begin at the planning phase of the project and continue through commissioning and post-occupancy services, with each step involving Beaufort County School District.

Preconstruction

The preconstruction phase will be led by Jake Plein with significant input from David Hamilton. Jason Morgan will provide Principal oversight. Project Manager, Matt McCormic, is heavily involved in Subcontractor solicitation, site planning, scheduling and GMP assembly.

Construction

All proposed team members will serve in the roles outlined in our provided organizational chart. David Hamilton will serve as the executive point of contact. Bob Barnard will be responsible for the on-site supervision of all construction activity. Support services will be provided as needed.

Post-Construction

Post-construction services will be overseen by David Hamilton, with assistance from the Project Managers and Superintendents. CPPI will provide 7 and 11 month walk-throughs. Further information about our post-construction services and our quality control program can be found in later sections of this document.



- Describe your team's experience as part of a similar Project Team.

EXPERIENCE AS PART OF A SIMILAR TEAM

All members of our proposed project team are currently working on the Whale Branch Early College High School Renovation.






WHALE BRANCH EARLY COLLEGE HS RENOVATION
BEAUFORT COUNTY SCHOOL DISTRICT



METHOD
CM at Risk - 6 Contract Amendments

PROJECT TYPE
RENOVATION

COST
$5,188,981

COMPLETION
January 2024

OWNER
Beaufort County School District

ARCHITECT
Quackenbush Architects

After a series of contract amendments, CPPI is currently revolutionizing the school's landscape by installing cutting-edge advancements in the IT infrastructure and fortifying its safety and security systems. This comprehensive initiative also encompasses cosmetic and maintenance repairs and added athletic facilities. The scope of work involves the installation of Internet and phone cabling, the implementation of Access and CCTV cabling and equipment, strategic data upgrades, and establishing new communications networks across the entire school. The enhancements aim to elevate the functionality, safety, and security of the school.

EXPERIENCE AS PART OF A SIMILAR TEAM

All members of our proposed project team previously worked on the Technical College of the Lowcounty - culinary Institute of the South.





TECHNICAL COLLEGE OF THE LOWCOUNTRY
CULINARY INSTITUTE OF THE SOUTH



METHOD
COMPETITIVE BID

PROJECT TYPE
NEW CONSTRUCTION

COST
$10,300,000

COMPLETION
October 2021

OWNER
Culinary Institute of the South

ARCHITECT
KRA Architecture and Design

The Culinary Institute of the South accommodates 300 students. It features a 26,000-square-foot culinary training facility with six academic classrooms, two teaching kitchens, a baking lab, a lecture theater, and a teaching restaurant. In addition, the Institute will has an interactive museum on campus, called the FOODseum. The facility features immersive exhibits, hands-on seminars, and guest lecturers all focused on the preservation and education of Lowcountry agriculture and farming history, making it the first of its kind in the South.

• Describe your previous experience in providing similar services as described above. Provide a minimum of three references of similar projects for these services

CPPI
CHARLES PERRY PARTNERS, INC

PREMIER K-12 BUILDERS

CPPI has delivered hundreds of K-12 projects for both public and private clients. This includes 5.8 million square feet in K-12 facility construction across hundreds of campuses.

The heart of our process of engaging with BCSD is CPPI's experience working with local governing authorities and planning construction groups for the last several decades. In that time span, we have built a full range of projects from small continuing projects to multi-million dollar capital projects. With this experience, we are not only familiar with these standards and their intent, but also the personnel and processes behind them. We host scope review meetings to run down the full project goals and operational functions and sequences with the entire team. We perform a review of the standards and compare them to the construction documents and clarify any discrepancies.

Using this information, we develop bid scope documents which contain all the subtle intricacies of the project along with lessons learned from many years of experience working for educational clients.

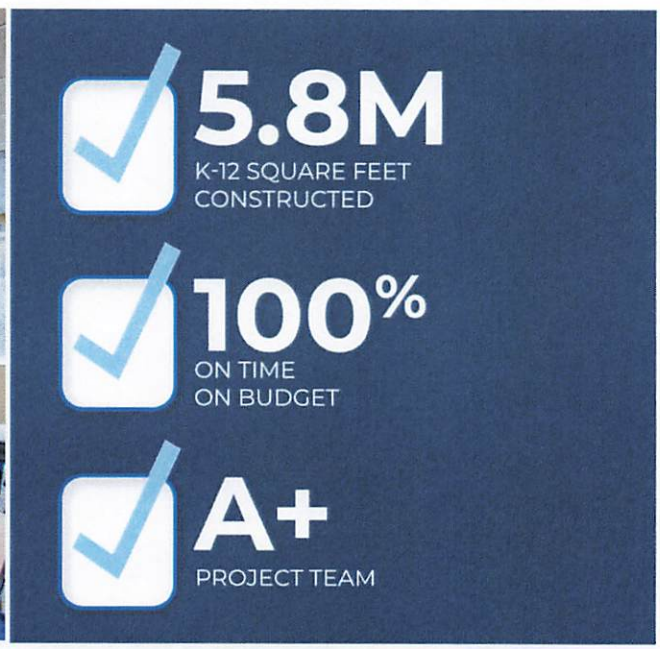
As a team, we review bid scopes to ensure we have captured the intent of the design. The bid documents are then sent to experienced, prequalified subcontractors and are reviewed in detail with each of them. Any questions or clarifications that arise are addressed and submitted to all bidders. Finally, we prepare a thorough and detailed Guaranteed Maximum Price for review by the project team.

We host in-depth review meetings of the GMP with all stakeholders present to ensure we have the design and requirements covered and that we adequately plan for unforeseen issues.

With CPPI having more than 55 years in building new and renovating educational facilities, we have formed great working relationships with our sub-consultants.

This experience combined with our approach to teaming and collaboration allows us to deliver maximum value for our clients.





• Describe your previous experience in providing similar services as described above. Provide a minimum of three references of similar projects for these services

EDUCATIONAL REFERENCES

TECHNICAL COLLEGE OF THE LOWCOUNTRY

LS3P

OCPS

Alachua County Public Schools

UCF UNIVERSITY OF CENTRAL FLORIDA

[redacted]


Culinary Institute of the South


Groves K-12


ESE Campus Consolidation


Idylwild ES


Research 1 Facility

90% REPEAT CLIENTS

10% NEW CLIENTS

- For the past three years, provide the following information:
  a. Identify all projects (name, location, completion date and Contract amount).
  b. Identify all new construction projects with similar scope. Additionally:
  i. Indicate any such project where Liquidated Damages were assessed against your firm for failure to achieve substantial completion within the Contract Time, and describe the circumstances of the same;
  ii. Identify any such project in which your firm made a Claim or Change Order Request for acceleration damages, and describe the circumstances of the same;
  iii. Identify any such project in which your firm was terminated (whether for cause or for convenience) by the owner prior to substantial completion, and describe the circumstances of the same;
  iv. Identify all projects which had a negotiated fee or guaranteed maximum price;
  v. Identify all projects (description and cost) which had a Guaranteed Maximum Price prior to completion of the documents;

CPPI PROJECTS: 2020-PRESENT

Project Name / Location / Completion Date / Contract Amount	Renovation Project?	Liquidated Damages Assessed?	Claim / Change Order for Acceleration Damages?	Terminated Prior to Substantial Completion?	Negotiated Fee or Guaranteed Maximum Price?	Guaranteed Maximum Price Prior to Completion of Documents?
Citizen's Center Interior Renovation New Port Richey, FL Completion Date: July 2023 Contract Amount: $4.7M	Yes	No	No	No	Negotiated Fee	No
Memorial Hospital of Jacksonville Hybrid OR Renovation / MRI Bi-Plane Jacksonville, FL Completion Date: July 2023 Contract Amount: $6.2M	Yes	No	No	No	Negotiated Fee	No
Veve Cottages at Archer Road Orlando, FL Completion Date: June 2023 Contract Amount: $30M	No	No	No	No	Yes – Guaranteed Maximum Price	No
SiVance Modular Manufacturing Units Gainesville, FL Completion Date: June 2023 Contract Amount: $17.6M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Osceola Hospital Lobby Expansion Orlando, FL Completion Date: March 2023 Contract Amount: $8.7M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Dunn Village Free Standing ED Jacksonville, FL Completion Date: February 2023 Contract Amount: $7.7M	No	No	No	No	Negotiated Fee	No
Hillsborough Community College New District Admin Building, Tampa, FL Completion Date: February 2023 Contract Amount: $16.9M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Lane Avenue Free Standing ER, Jacksonville, FL Completion Date: January 2023 Contract Amount: $7.7M	No	No	No	No	Negotiated Fee	No
NCSD Yulee High School Addition, Yulee, FL Completion Date: January 2023 Contract Amount: $11.5M	No	No	No	No	Negotiated Fee	No
UF Health Florida Surgical Center OR #14 Renovation, Gainesville, FL Completion Date: August 2022 Contract Amount: $.8M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Livestock & Pultry – Turkey Grow-Out and Broiler Grow-Out Facilities, Blacksburg, VA Completion Date: August 2022 Contract Amount: $5.8M	No	No	No	No	Negotiated Fee	No
SBAC Idylwild ES Redesign & Redevelopment, Gainesville, FL Completion Date: August 2022 Contract Amount: $16.2M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Trenton High School Cafetorium, Trenton, FL Completion Date: August 2022 Contract Amount: $9.5M	No	No	No	No	Negotiated Fee	No

CPPI PROJECTS: 2020-PRESENT

Project Name / Location / Completion Date / Contract Amount	Renovation Project?	Liquidated Damages Assessed?	Claim / Change Order for Acceleration Damages?	Terminated Prior to Substantial Completion?	Negotiated Fee or Guaranteed Maximum Price?	Guaranteed Maximum Price Prior to Completion of Documents?
Campus Landscape Master Plan, Gainesville, FL Completion Date: June 2022 Contract Amount: $3.9M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Concentrix Building 285 Renovations, Orlando, FL Completion Date: April 2022 Contract Amount: $8.9M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Blake Medical Center Surgery Expansion / ICU Renovation, Bradenton, FL Completion Date: April 2022 Contract Amount: $22.9M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Soccer & Lacrosse Stadium Expansion & Improvements, Gainesville, FL Completion Date: April 2022 Contract Amount: $5.7M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Reunion Village Free Standing Emergency Room, Orlando, FL Completion Date: April 2022 Contract Amount: $8.9M	No	No	No	No	Yes – Guaranteed Maximum Price	No
LewisGale Medical Center Blue Hills Free Standing ER, Roanoke, VA Completion Date: March 2022 Contract Amount: $5.9M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Capital Regional Medical Center Rehab / NICU Expansion / Bi-Plane Addition, Tallahassee, FL Completion Date: March 2022 Contract Amount: $20M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Largo Regional Medical Center Facility Upgrades & Renovation, Largo, FL Completion Date: February 2022 Contract Amount: $6M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Harvest Building C Indoor Grow Facility – Phase I, Alachua, FL Completion Date: December 2021 Contract Amount: $12.7M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Florida Surgical Center 23-Hour Unit Addition, Gainesville, FL Completion Date: December 2021 Contract Amount: $5.6M	No	No	No	No	Yes – Guaranteed Maximum Price	No
New Hampstead K-8, Savannah, GA Completion Date: December 2021 Contract Amount: $38.5M	No	No	No	No	Negotiated Fee	No
Orange Grove Elementary School Phase II, Seminole, FL Completion Date: December 2021 Contract Amount: $14.2M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Reitz Union Lawn Inner Road Thermal Utilities, Gainesville, FL Completion Date: November 2021 Contract Amount: $3.9M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Lowcountry Culinary Arts Institute & Interpretive Center, Beaufort, SC Completion Date: November 2021 Contract Amount: $11M	No	No	No	No	Negotiated Fee	No

CPPI PROJECTS: 2020-PRESENT

Project Name / Location / Completion Date / Contract Amount	Renovation Project?	Liquidated Damages Assessed?	Claim / Change Order for Acceleration Damages?	Terminated Prior to Substantial Completion?	Negotiated Fee or Guaranteed Maximum Price?	Guaranteed Maximum Price Prior to Completion of Documents?
James Marlowe Elementary School Classroom Building Addition & School Remodel, New Port Richey, FL Completion Date: October 2021 Contract Amount: $7.1M	No	No	No	No	Yes – Guaranteed Maximum Price	No
SCPS Teague Middle School HVAC Renovation, Altamonte Springs, FL Completion Date: August 2021 Contract Amount: $3.4M	Ye	No	No	No	Yes – Guaranteed Maximum Price	No
Midtown Center for Accelerated Skills Training Build-Out, Orlando, FL Completion Date: August 2021 Contract Amount: $1.9	Yes	No	No	No	Negotiated Fee	No
Pepin Academies Riverview Campus Build-Out, Riverview, FL Completion Date: July 2021 Contract Amount: $1.7M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Palm Coast Campus Building 1 Remodel, Palm Coast, FL Completion Date: June 2021 Contract Amount: $3.6M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Orange County Public Schools Exceptional Student Education Campus Consolidation Projects, Orlando FL Completion Date: June 2021 Contract Amount: $38.6M	No	No	No	No	Yes – Guaranteed Maximum Price	No
School Board of Hillsborough County – Referendum Projects (3 Schools – Benito MS, Clark ES, Wharton HS) Tampa, FL Completion Date: June 2021 Contract Amount: $17.8M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Children's Board of Hillsborough County Family Resource Center Tampa, FL Completion Date: June 2021 Contract Amount: $1.2M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
North Florida Regional Medical Center South Tower Vertical Expansion Gainesville, FL Completion Date: May 2021 Contract Amount: $42.8M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Pegasus Technologies, Inc. New Operations Center Building Jacksonville, FL Completion Date: May 2021 Contract Amount: $5.1M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Infinite Energy Office Building Gainesville, FL Completion Date: March 2021 Contract Amount: $14.9M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Medical Center of Trinity Women's Services & Surgical Expansion Trinity, FL Completion Date: March 2021 Contract Amount: $12.5M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Harvest – San Felasco Expansion Gainesville, FL Completion Date: December 2020 Contract Amount: $2.8M	No	No	No	No	Yes – Guaranteed Maximum Price	No

CPPI PROJECTS: 2020-PRESENT

Project Name / Location / Completion Date / Contract Amount	Renovation Project?	Liquidated Damages Assessed?	Claim / Change Order for Acceleration Damages?	Terminated Prior to Substantial Completion?	Negotiated Fee or Guaranteed Maximum Price?	Guaranteed Maximum Price Prior to Completion of Documents?
Pepin Academy, Tampa FL Completion Date: December 2020 Contract Amount: $6.8M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Exactech Renovations Gainesville, FL Completion Date: October 2020 Contract Amount: $14.3M	No	No	No	No	Yes – Guaranteed Maximum Price	No
Virginia Tech Kentland Farm – Metabolic Research Lab, Blacksburg, VA Completion Date: October 2020 Contract Amount: $6.3M	No	No	No	No	Negotiated Fee	No
Virginia Tech Kentland Farm – BETR Building Blacksburg, VA Completion Date: October 2020 Contract Amount: $2.1M	No	No	No	No	Negotiated Fee	No
Franklin MS HVAC Renovations, Tampa FL Completion Date: August 2020 Contract Amount: $3.6M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
School Board of Hillsborough County – Referendum Projects (3 Schools – Benito MS, Clark ES, Wharton HS), Tampa FL Completion Date: August 2020 Contract Amount: $17.8M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
UF Health The Oaks – Surgery Center Gainesville, FL Completion Date: August 2020 Contract Amount: $9.9M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Sarasota Memorial Hospital Outpatient Cancer Center, Sarasota, FL Completion Date: July 2020 Contract Amount: $12.1M	No	No	No	No	Yes – Guaranteed Maximum Price	No
UCF Student Union Expansion, Orlando, FL Completion Date: July 2020 Contract Amount: $16M	No	No	No	No	Yes – Guaranteed Maximum Price	No
City of Wildwood Police Department Wildwood, FL Completion Date: July 2020 Contract Amount: $6.9M	No	No	No	No	Yes – Guaranteed Maximum Price	No
SBAC Prairie View ES Renovation, Gainesville, FL Completion Date: July 2020 Contract Amount: $4.5M	Yes	No	No	No	Yes – Guaranteed Maximum Price	No
Orange Park Medical Center – Dietary & CEP Expansion/Renovation Jacksonville, FL Completion Date: July 2020 Contract Amount: $18.8M	No	No	No	No	Yes – Guaranteed Maximum Price	No

- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

BRADWELL INSTITUTE RENOVATIONS

LIBERTY COUNTY SCHOOL DISTRICT



K-12
Occupied Campus



[redacted]

Date Completed:
March 2019

Cost:
$5,736,043

Size:
38,000 SF

Proposed Team Members On This Project:
Jason Morgan, Principal-in-Charge
Jake Plein, Director of Preconstruction
David Lowe, Chief Estimator
Lee Hall, MEPFP Coordinator
Austin Weingart, Safety Manager

The Bradwell Institute, a public high school located near the U.S. Army's Fort Stewart, underwent an extensive renovation to the existing gymnasium and former vocational areas. The renovations consisted of demolition, new MEP systems, wall modifications, new gym bleachers, new gym wood flooring, new locker rooms, group restrooms, classrooms, and coaches' offices.

The project emphasized local and minority business enterprise (MBE) participation, early procurement of major MEP and equipment systems, coordination with occupied campus activities, and sustainable construction practices.

- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

REFERENDUM PROJECTS PH III - WHARTON HIGH SCHOOL, BENITO ELEMENTARY SCHOOL AND CLARK ELEMENTARY SCHOOL

HILLSBOROUGH COUNTY PUBLIC SCHOOLS



K-12
Occupied
Campus

[redacted]



Date Completed:
August 2020

Cost:
$13,742,143

Size
3 Schools

Proposed Team Members On This Project:
Jason Morgan, Principal-in-Charge
Jake Plein, Director of Preconstruction
David Lowe, Chief Estimator
Lee Hall, MEPFP Coordinator
Austin Weingart, Safety Manager

The Referendum Projects Phase 1 is the first batch of capital projects funded by the new sales tax. CPPI was awarded three projects under this contract:

Wharton High School:
Replaced all water side equipment including chillers, pumps and boilers. Replaced all air side equipment including VAVs, air handlers (AHU) ,mini- split system units, fans and controls. Serviced and rejuvenated the existing cooling towers.

Benito Middle School:
Replaced all water side equipment including chillers, pumps, boilers and cooling towers. Replaced all air side equipment including VAVs, air handlers (AHU), mini-split system units and fans and controls.

Clark Elementary School:
Replaced all water side equipment including air cooled chillers and pumps . Replaced all air side equipment including VAVs, air handlers (AHU) ,mini- split system units and fans.

- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

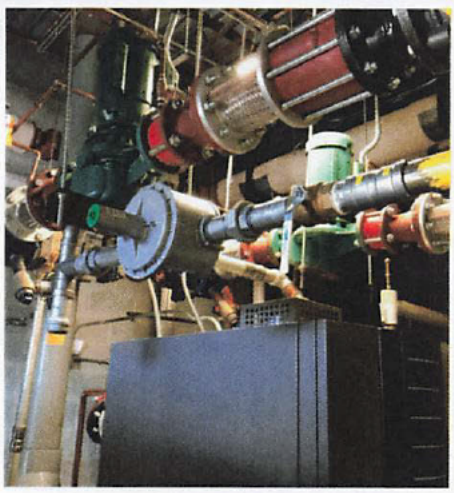
TEAGUE MIDDLE SCHOOL CAPITAL RENEWAL

SEMINOLE COUNTY PUBLIC SCHOOLS



K-12
Occupied Campus

[redacted]





Date Completed:
August 2021

Cost
$3,403,899

Size
100,000 SF

Proposed Team Members On This Project:
Jason Morgan, Principal-in-Charge
Jake Plein, Director of Preconstruction
David Lowe, Chief Estimator
Lee Hall, MEPFP Coordinator
Austin Weingart, Safety Manager

This project consisted of the complete replacement of the HVAC system at Teague Middle School. The scope of this project included removal and replacement of water cooled chillers with air cooled chillers, pumps, air handling units, chiller piping connections, hvac controls, removal and replacement of VAVs, chilled water fan coil units, cleaning the ducts, and test and balance for Teague Middle School.

This project was phased around the school year in order to minimize impact on students.

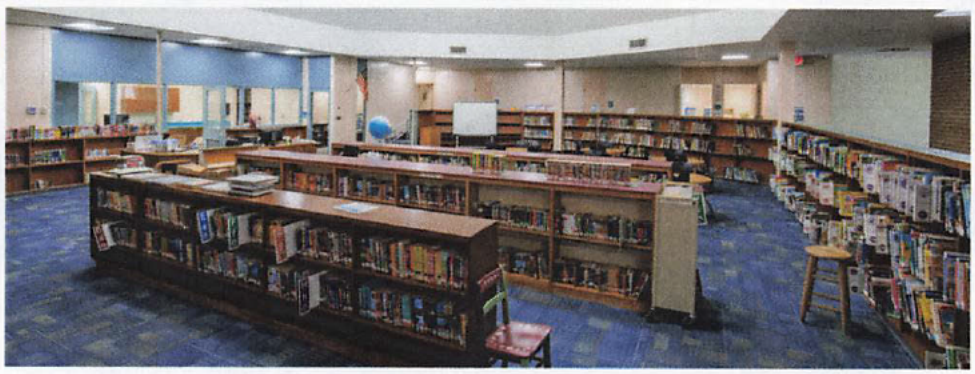
- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

PRAIRIE VIEW ELEMENTARY SCHOOL RENOVATIONS

ALACHUA COUNTY PUBLIC SCHOOLS



K-12
Occupied Campus



[redacted]

Date Completed:
July 2020

Cost
$4,447,479

Size
164,000 SF

Proposed Team Members On This Project:
Jason Morgan, Principal-in-Charge
Jake Plein, Director of Preconstruction
David Lowe, Chief Estimator
Lee Hall, MEPFP Coordinator
Austin Weingart, Safety Manager

This 72,000 square-foot project consisted of a variety of ADA code upgrades to bring students back into the facility after several years of it being unoccupied.

Key elements of the renovation consisted of a full-scale HVAC upgrade, including a new chiller, 38 new rooftop units, three new air handling units, and a replacement of all Variable Air Volume systems. New ceilings were installed, and the facility was given fresh paint on the interior and exterior. Much of the flooring was replaced, and the remaining flooring was repaired. All door hardware was replaced and new exterior doors were installed.

Security upgrades include a new front-office access control system and a new intercom system. Exterior fencing was installed around the entire campus, including new security to control access to campus.

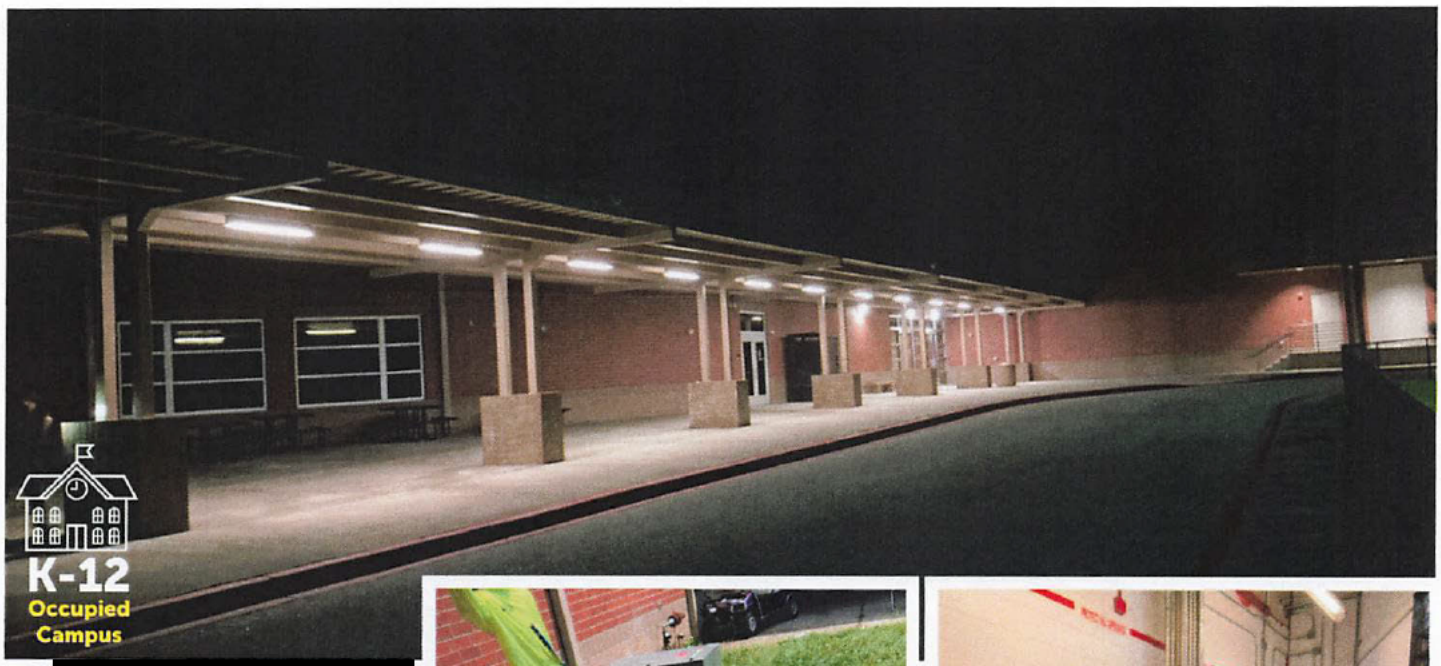
In addition, all of the facility's lighting was replaced with energy-efficient LED lights. A new walkway canopy was installed at the bus loop to protect student and staff from the elements. New data outlets were also installed to enable more computer and network capabilities. New ADA compliant water fountains were also installed.

In the kitchen, all new refrigeration systems in the cooler and freezer were installed. Other existing equipment from Idylwild Elementary School was moved in. The kitchen hood and associated Ansul System was renovated.

- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

WHALE BRANCH EARLY COLLEGE HIGH SCHOOL RENOVATION

BEAUFORT COUNTY SCHOOL DISTRICT



K-12
Occupied Campus

[redacted]





Completion:
January 2024

Cost:
$4,057,460

Size
N/A

Proposed Team Members On This Project:
Jason Morgan, Principal-in-Charge
David Hamilton, Regional VP
Matt McCormic, Project Manager
Bob Barnard, Sr. Superintendent
Mike Riban, Superintendent
Jake Plein, Director of Preconstruction
David Lowe, Chief Estimator
Lee Hall, MEPFP Coordinator
Austin Weingart, Safety Manager

After a series of contract amendments, CPPI is currently revolutionizing the school's landscape by installing cutting-edge advancements in the IT infrastructure and fortifying its safety and security systems. This comprehensive initiative also encompasses cosmetic and maintenance repairs and added athletic facilities. The scope of work involves the installation of Internet and phone cabling, the implementation of Access and CCTV cabling and equipment, strategic data upgrades, and establishing new communications networks across the entire school. The enhancements aim to elevate the functionality, safety, and security of the school.

- Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules and references.

CPPI HAS SUCCESSFULLY COMPLETED HUNDREDS OF PROJECTS ON OCCUPIED CAMPUSES



The CPPI team is well versed in the challenges that are present when working on an occupied campus. Our primary role is to schedule our work to avoid interfering with the daily school functions including student drop off and pick up. We pride ourselves in working together with the school to make sure the students are safe and the daily school operations are not affected.

Having provided construction services on occupied campuses for hundreds of major projects and thousands of minor projects, we understand the needs of The District. Below are several of the items that will be included in our site utilization plan. This plan will become our roadmap for communication for all stakeholders involved in the construction process.

- **STANDARDIZED TESTING** - Our team will plan to stop noisy construction work during weeks of standardized testing to allow for the full concentration of teachers and students.
- **COMMUNICATION** - We will communicate with the school staff daily concerning the departments that may be affected by the construction.
- **SIGNAGE/WAYFINDING** - Various methods will be used to communicate clearly with all who pass the construction area to assist them with new pedestrian and vehicular traffic patterns as well as updates on the construction process.
- **CLEAN SITE** - We understand it is not only important to keep the campus aesthetically pleasing during construction but it is necessary for the safety of all involved.
- **NOISE** - Noise and vibration can affect the building occupants. We pay close attention to the campus schedule and are sensitive to the needs of the staff, students, and departments. We will adjust our activities to accommodate the occupants.
- **DUST CONTROL** - Our team is aware of the importance of stopping the migration of dust from the project area. By utilizing the appropriate methods which may include physical barriers between the new construction and existing structure and water trucks for site dust control to consolidate the soil.



- **CONSTRUCTION TRAFFIC** - Our team will create a Material Delivery traffic plan that does not impact the daily operation of the campus.
- **SITE SPECIFIC STAGING ISSUES** - Once the specific details of the project are available, Our team will address the scheduling needs of the school's class schedule calendar in order to address any utility tie ins/shutdowns for the project. In addition, Our team will formulate a plan for storm water retention needs, material staging, as well as off-site construction parking.

Identify your annual volume of Construction Contracts for the last five years. Where a local office is involved, please provide similar information for the local office.

- What is the current dollar value of work under Contract?
- What is the typical dollar range of projects under Contract with your firm?
- Identify what percentage of your work is hard bid and what percentage is based on a CM/GC at Risk or similar approach?
- Identify what percentage of your work is renovation versus new construction.

Annual Volume Of Construction Contracts

[redacted]

Savannah Office:

[redacted]

Current Dollar Value Of Work Under Contract

[redacted]

Typical Dollar Range Of Projects Under Contract

[redacted]

Percentage Of Hard Bid Work Vs. Cm/Gc At Risk Or Similar Approach

[redacted]

Percentage Of Renovation Work Vs. New Construction

[redacted]

- Submit your most recent financial statements (at a minimum, balance sheets and income statements for 2020 and 2021) and verification of current bonding capacity.
- Provide two bank references.
- Describe all instances of project disputes, which, in the last five years, reached the level of:
  a. Formal mediation, arbitration, or litigation;
  b. Significant settlements with clients, contractors, or sub-contractors; or
  c. Current significant pending claims or suits.
- For each dispute, describe the parties involved, the nature of the dispute, and the amount of the dispute. Please provide this information for all such disputes arising out of the firm's projects, regardless of whether the firm was a party or witness in the dispute.
- Identify any occasion in the past five (5) years where any Surety was required to pay any claim against any Payment Bond furnished by the Proposer for any project.
- Identify any occasion in the past five (5) years where any Surety was required to render or secure performance due to any owner under any Performance Bond furnished by the Proposer for any project.
- Identify any occasion in the past five (5) years where any Surety requested any owner of a project in which the Proposer had furnished Performance and/or Payment Bonds to make any payment(s) by joint check to the Proposer and Surety.
- Provide a certificate showing your current Commercial General Liability (CGL) insurance policy and any other insurance policies (such as professional liability) that would be applicable to the Project.
- Provide your current bonding rate schedule.

Financial Statements & Bonding Capacity

Please see the enclosed confidential financial statement. Bonding capacity letter can be found on following pages.

Bank References

[redacted]

Project Disputes

No significant project disputes in the past five (5) years.

Identify any occasion in the past five (5) years where any surety was required to pay any claim against any payment bond furnished by the proposer for any project.

N/A

Identify any occasion in the past five (5) years where any Surety was required to render or secure performance due to any owner under any Performance Bond furnished by the Proposer for any project.

N/A

Identify any occasion in the past five (5) years where any Surety requested any owner of a project in which the Proposer had furnished Performance and/or Payment Bonds to make any payment(s) by joint check to the Proposer and Surety.

N/A

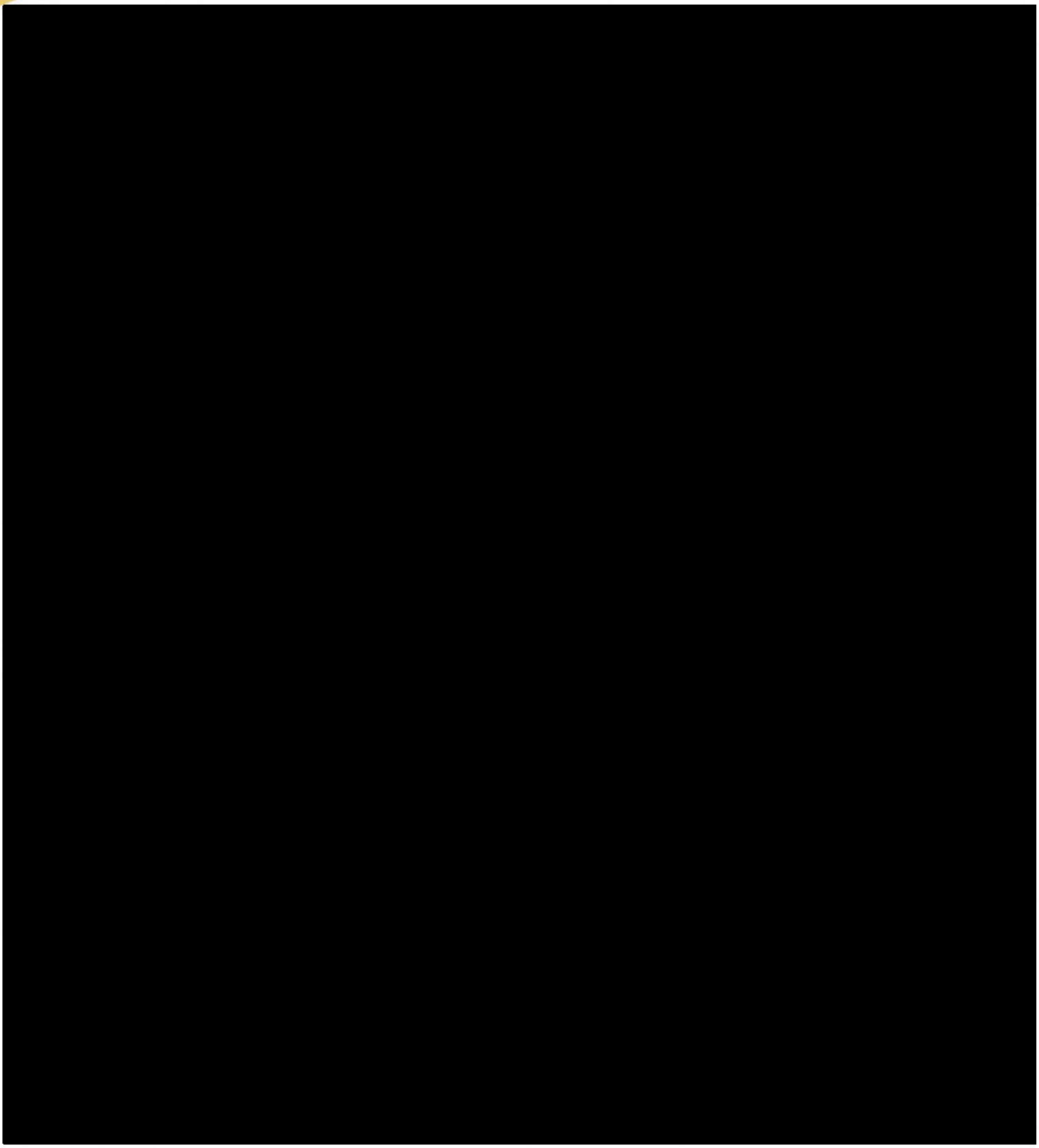
Insurance Certificate

Please see following pages.

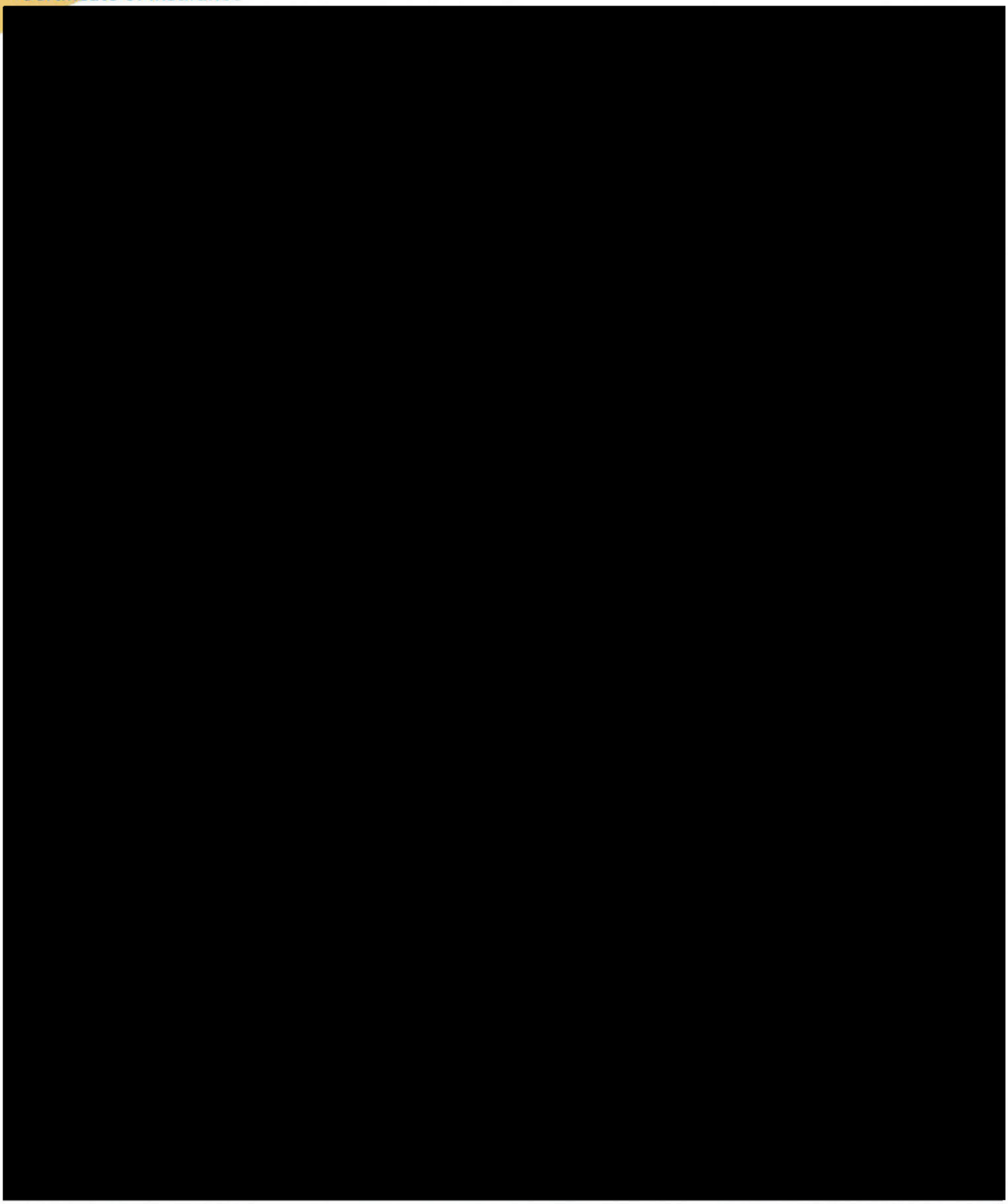
Current Bonding Rate Schedule

Please see following pages.

Bonding Capacity



Certificate of Insurance



Bonding Rate Schedule

[redacted]



The Proposal must address the following:

• Pre-Construction services will vary from project to project depending on the scope and complexity of each project. Services will include field verification, constructability reviews, and cost estimating. Provide hourly rates for the following services:

a. Estimating - **$125/hr**
b. Field Verification - **$108/hr.**
c. Constructability Reviews - **$103/hr.**
d. Project Management (during pre-construction) - **$115/hr.**

BIDDING SCHEDULE / PRICE BUSINESS PROPOSAL

Pre-Construction Phase Service Fee: **$60,000**

Construction Phase Service Fee ($11 Million Cost of the Work)

Plus, cost of Performance & Payment Bonds: **$72,243**

Fees as % of Cost of the Work:

Project Cost:

$1,000,000 - $5,000,000	**8%**
$5,000,000 - $10,000,000	**7.5%**
$10,000,000 - $15,000,000	**6%**
$15,000,000 - $20,000,000	**6%**
$20,000,000 - $25,000,000	**5.5%**

The selected Contractor(s) shall be required to hold a publicly advertised pre-bid meeting(s), covering all projects, prior to accepting bids to be used in preparation of the GMP.

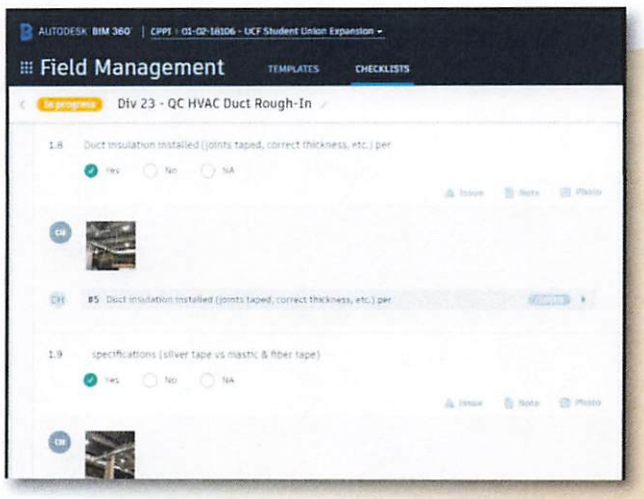
- The selected Contractor shall be required to obtain a minimum of 3 qualified, competitive bids for all work in excess of $100,000.00. Adequate price competition must exist for all components of the construction work awarded by a construction manager at-risk on the basis of competitive bids. The owner will require that all bids be compiled and presented prior to or at the establishment of the GMP. The owner shall be present when all bids are opened for review.
- The contract with a construction manager at-risk cannot involve cost reimbursement.
- All construction management services provided by a construction manager at-risk must be paid as a fee based on either a fixed rate, fixed amount, or fixed formula.
- Construction may not commence until the bonding requirements have been satisfied. Subject to the foregoing, bonding may be provided, and construction may commence for a designated portion of the construction.
- In a construction management at-risk project, construction may not commence for any portion of the construction until after the District and the construction manager at risk contract for a fixed price or a GMP regarding that portion of the construction.
- The District shall have the right at any time, and for three years following final payment, to audit the construction manager at-risk to disallow and to recover costs not properly charged to the project. Any costs incurred above the GMP shall be paid for by the construction manager at-risk.
- A construction manager at-risk may not self-perform any construction work for which subcontractor bids are invited, unless no acceptable bids are received, or a subcontractor fails to perform. The contract with a construction manager at-risk requires the construction manager at-risk to invite bids for all major components of the construction work.
- The Owner reserves the right to pre-qualify and/or approve subcontractors.

CPPI ACCEPTS ALL OF THE CONDITIONS AS OUTLINED ABOVE.

- Describe your information management systems and Owner reporting systems. Explain how these systems tie to the initial cost projections and final estimate.

REPORTING

CPPI combines its construction expertise with industry-leading information systems to serve as steadfast stewards of your resources. We prepare and provide detailed project-specific information so the team can collectively make the right decisions at the right times.



TYPES OF REPORTS

- Basic administration
- Request for information
- Request for information log
- Submittals
- Meeting Minutes
- Document Control
- Contacts
- Contract Administration

CASH FLOW SUMMARY

The cash flow summary is a living record tracking every dollar shift on the project. This is a form we created to track the following:



- GMP amounts per trade
- Buy-out contingency culmination after bid award
- Buy-out contingency use during the project
- Project contingency use during the project
- ODP amounts deducted from the GMP
- ODP tax savings
- ODP tax savings use during the project
- Allowances and allowance use during the project
- Subtotals for each type of savings or contingency
- Pending change amounts
- Total savings and total saving with pending being removed

This is a great tool to explain where to dollars go, how they were spent and make decisions based on what is remaining in the project.



DAILY REPORTS

These reports have full details of weather and site conditions, contractor's labor force, progress achieved, site visitors, problems, and issues that may impact the project. The superintendent's daily log contains all work activities, personnel, status of materials, deliveries, schedule progress, and inspections records.

- Describe your information management systems and Owner reporting systems. Explain how these systems tie to the initial cost projections and final estimate.

PROJECT MANAGEMENT SOFTWARE

Autodesk Build is our real time-tracking and on-line software database that reports all aspects of the project from an updated RFI log and meeting minutes to communication with BCSD, and much more. This software allows the BCSD, CPPI and Little team to view the status of the project at any given point.

COMMUNICATION AND RECORD KEEPING

CPPI brings the latest technology directly to the project site. We deploy portable tablets in the field allowing for immediate information gain and communication on all facets of the project. This paperless technology provides all members of the team with complete access to all documents including purchase orders, drawings, site plans, meeting minutes, requests for information, and more.

CASH FLOW TRACKING

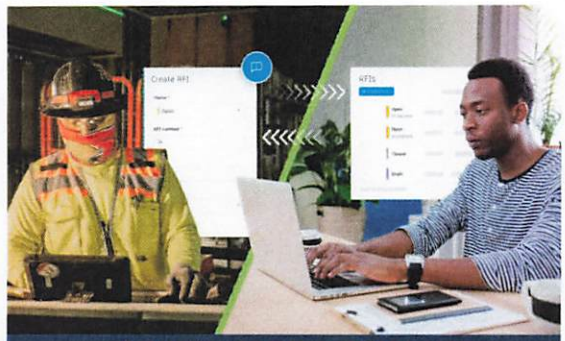
A real-time record for tracking every dollar expended on the project is maintained for the team to view at any time. This explains expenditures and documents how funds are being spent. This fiscal knowledge allows the collective team to make decisions based on real-time funds remaining in the project.

SCHEDULE MANAGEMENT

The team is provided access to the entire schedule, along with names and contact information of every subcontractor and supplier working on the project. This immediate access to all project information gives our field staff the knowledge necessary to effectively supervise and direct operations, which improves both production and quality.

INFORMATION MANAGEMENT SYSTEMS

These systems and controls collectively provide an open and proactive flow of information to all the project's stakeholders. This information allows the team to professionally manage the project's resources to ensure time and money are expended wisely and in accordance with the BCSD's requirements.



CLOUD BASED PROJECT MANAGEMENT

CPPI operates a cloud network to share important real-time documentation including:

- ☑ Submittals
- ☑ Request for Information
- ☑ Meeting Minutes
- ☑ Emails
- ☑ ODP Program and Status
- ☑ QC Programs and Checklists
- ☑ Safety Programs and Reports
- ☑ Schedules and Updates

By placing this information and documentation in the cloud, access is immediate and real-time for on-site construction staff, as well as BCSD's staff.



MANAGING CONVERSATION AND COMMUNICATION **TO PROMOTE ACTION.**

- Describe the process you would utilize to qualify and bid subcontractors and vendors for the project.

SUBCONTRACTOR MANAGEMENT

The successful proactive management of trade contractors begins early in the design process. Proper planning, communication, collaboration, and respect are crucial elements that are essential for not only the management and coordination of trade contractors, but also for the delivery of a completed high quality project.

This management approach creates a professional and positive environment that relies on input from all parties involved in a project, and effectively encourages dialogue between team members that can preemptively address any potential conflict that may arise under different conditions.

CPPI is recognized for the excellent job-site management that is provided, primarily due to strong relationships that have been built over a lengthy period of time with trade contractors throughout the state.



- Management and coordination of all team members is a vital element of any successful project, but it can be absolutely critical when involving the complexities of multi-phased and occupied building construction.

CPPI takes all necessary steps to ensure communication and minimize conflicts between trades in the field. Prequalifying trade contractors and providing them with the defined scope of their roles helps to outline the expectations of CPPI, the Owner, and any site or project specific requirements.

- Our management team supports and respects all trade contractors, and strives to quickly and fairly resolve any minor issues before they become major concerns. This open channel of thorough communication, coordination and involvement is instilled and encouraged in all of our team members.

PROACTIVE MANAGEMENT

CPPI solicits the involvement of specialty systems trades and local contractors early in the process to generate interest, and to create a pool of pre-qualified contractors to utilize for projects. The primary criteria we base our selection on is whether each trade is capable of meeting the high quality standards that we set for each CPPI project. To help with this process CPPI utilizes experience, references, current and future workloads, the number of personnel in the organization, financial stability, and safety statistics.

CPPI

SUBCONTRACTOR PREQUALIFICATION FORM

Project Name _____

Company Name _____ Date _____

Mailing Address _____

Physical Address _____

City _____ State _____ Zip Code _____

Contact _____ Phone _____ Fax _____

E-Mail Address _____

Role (Sub, Supplier, etc.) _____ Contractor License No. _____

Spec. Divisions/Products Provided _____

Bid Package Interested in Bidding _____

MBE ☐ WBE ☐ Other ☐ _____

Has Your Company Worked with Charles Perry Partners, CPC or PPI in the Past? Y/N

If yes, please list those previous projects: _____

_____

List any Current Projects with Charles Perry Partners, Inc. _____

Geographic Area of Business Interest _____

Years in Business Under Present Name _____ Years Performing Work Specialty _____

Value of Work Presently Under Contract $ _____ Value of Work in Place Last Year $ _____

Value of Work Presently Bonded $ _____

Total Bonding Capacity $ _____

Bonding Surety _____

Bonding Agent Name & Phone # _____

Percentage of Work Performed by Own Forces _____

Number of Field Personnel _____ Number of Office Staff _____

Average Work Force for the Past Five Years _____ Approx. Value of Equip. Owned $ _____

Is Firm in Compliance with EEO Requirements? _____ In-House Engineering Capability ☐

If YES to any of the following, submit details on a separate sheet. In House Fabrication Capability ☐

Has Firm Ever Failed to Complete a Contract? _____

Has Firm Ever Been Involved in Bankruptcy or Reorganization? _____

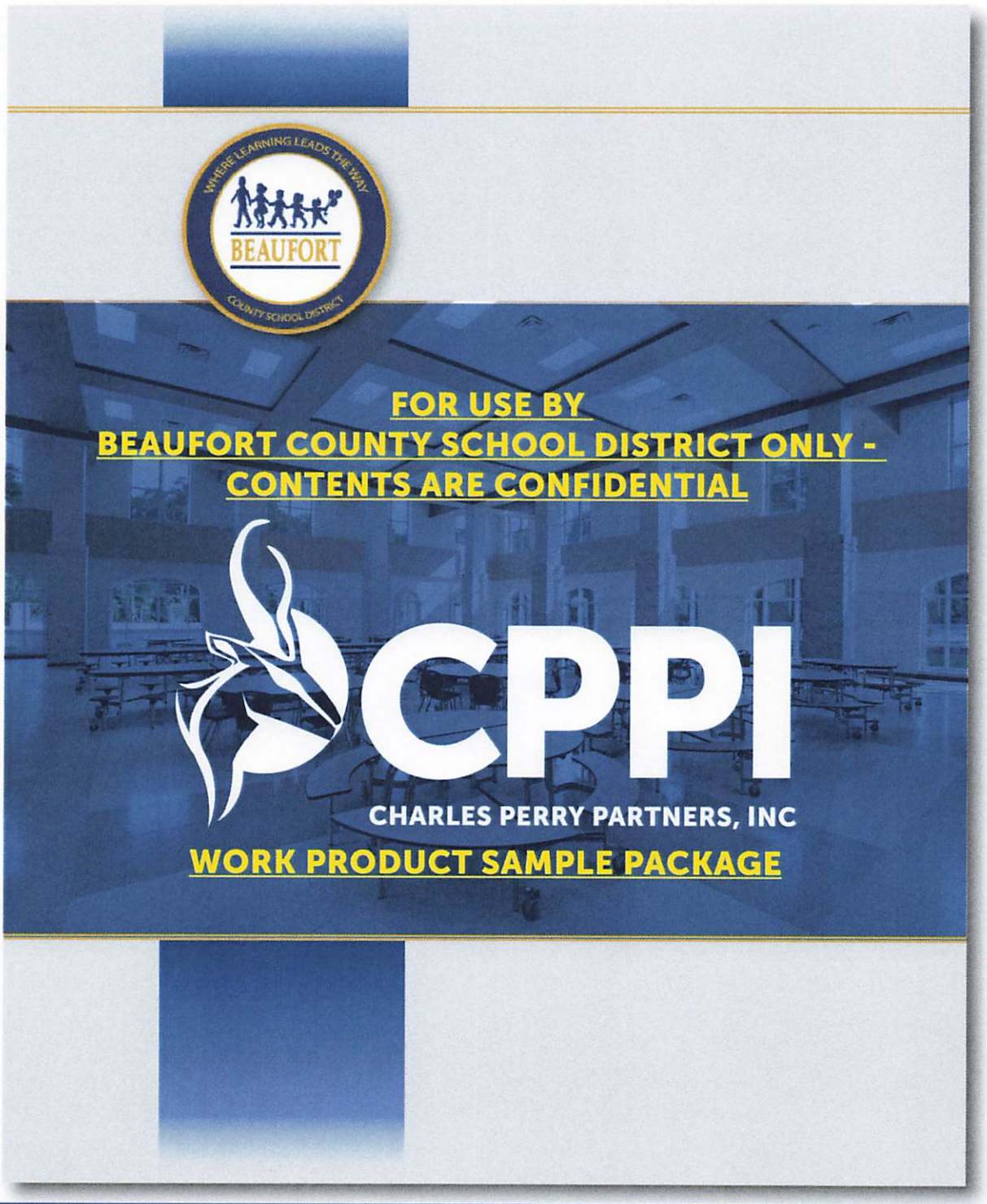
Has Firm Ever had Pending Judgment Claims or Suits Against it? _____

Once a contractor is pre-qualified, CPPI works to develop relationships with each company and their key staff. We include contractors during preconstruction and encourage their input to confirm that all personnel have a clear definition of the overall and individual goals for the project. Allowing contractors to participate in the early-stage decision making process has proven to be an effective way to avoid conflict resolution from the very beginning and throughout the life of a project.

- Include one sample of the following items with your response to the Request for Proposal (if these have been done previously with project management software as mentioned in Item 8 above, please submit printed examples in that format):
  a. Project Cost Estimate (similar format to the one proposed for this project)
  b. Daily and Monthly project report to the Owner
  c. Log(s) for tracking work progress
  d. Other tracking items you feel would be helpful in showing how you would assure the Project is delivered on time and on budget.

SAMPLE ITEMS

Please see the enclosed Work Product Sample Package under separate cover.



- Describe how you will address and promote the Owner's M/WBE Policy in the Construction Phase. All selected contractors will be expected to participate in District sponsored meetings promoting minority/local sub-contractor participation.

INCLUSIVITY

CPPI has a strict policy of non-discrimination, within our organization and with our clients and subcontractors. We understand the importance of valuing all individuals, talents and abilities and take a proactive approach to creating new opportunities for employees, subcontractors, vendors and suppliers. CPPI is committed to fairness and equity in contracting for every project.



EQUAL OPPORTUNITY PROVIDER

CPPI's objective is to ensure that all qualified firms have an equal opportunity to participate on our projects.

- We work to partner with suppliers and vendors who understand the value of a diverse workforce as well as supporting the communities in which they live and serve.
- This determination ensures that the subcontractor can perform the work and will devote their best people to the project.
- We seek out these firms to ensure they are contacted and have a chance to bid, and if needed, we will pair smaller businesses with larger 'mentor' firms.
- This allows them the opportunity to work on projects they might otherwise not be qualified for based on any number of factors.
- Careful consideration is given to all local trade contractors through local community outreach workshops and "meet and greet" functions.
- These functions are conducted by CPPI to educate the subcontractor market about the project and generate local subcontractor excitement.

We have found this process results in higher quality subcontractors and better overall pricing.

MENTORSHIP PROGRAM

CPPI designed a Mentorship Program to provide MBE and WBE owners the opportunity to win contracts while simultaneously training their management in all aspects of construction management on projects which the minority contractor cannot, or has not, had the opportunity to serve as sole contractor.

- Describe how you will address and promote the Owner's M/WBE Policy in the Construction Phase. All selected contractors will be expected to participate in District sponsored meetings promoting minority/local sub-contractor participation.

SUBCONTRACTOR PARTICIPATION

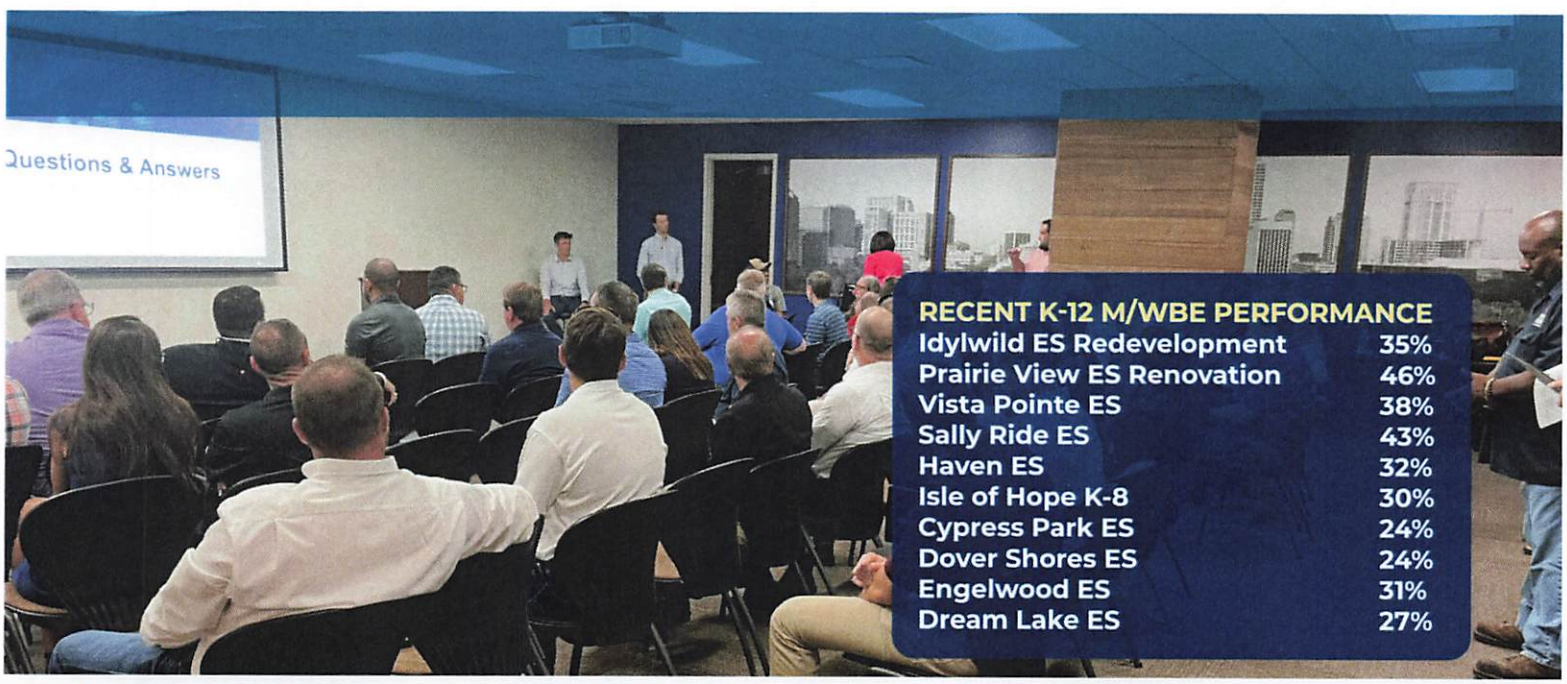
CPPI understands the importance of utilizing local area business vendors and suppliers. Our proactive approach and commitment to the process has afforded us the opportunity to continue to nurture existing relationships and create new opportunities for subcontractors, vendors and suppliers, and small construction firms. We are committed to fairness and equity in contracting with small business enterprises for this and all projects. CPPI is poised to provide the District exceptional performance while meeting your intent to include local area providers. Our approach to maximize participation includes:

OUTREACH

- ☑ Announce, advertise, solicit, and attract interested firms.
- ☑ Conduct training, seminars, and workshops to make firms aware of the opportunities and requirements.
- ☑ Collect the contact information of all interested firms.
- ☑ Based on firm engagement, package select segments of the work to favorably align with the interests and capabilities of the competitive marketplace.
- ☑ Introduce and connect small firms that could gain an advantage through a teaming arrangement with larger firms.

BID PROCESS

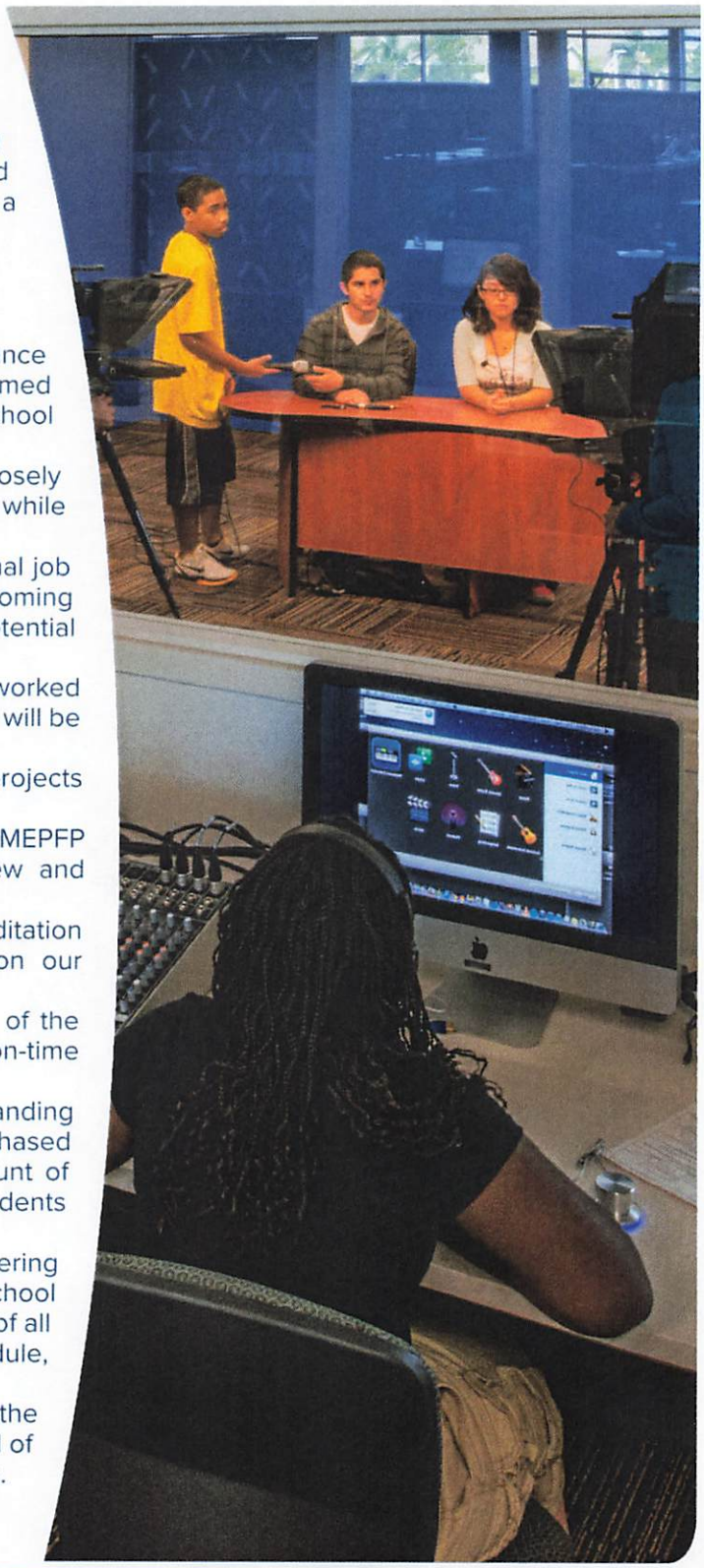
- ☑ Conduct pre-bid sessions to explain the process and requirements.
- ☑ Prequalify potential bidders.
- ☑ Follow-up with network of interested firms – both small and large to promote teaming arrangements.
- ☑ Review bid responses for compliance, competitiveness, and participation.
- ☑ Directly prior to the bid dates, actively engage the marketplace to maximize participation, responsiveness, and bid submission.
- ☑ Evaluate and level the responsive bids. Determine package recipient.
- ☑ Present list of intended recipients to BCSD and confirm level of participation.



- Any other information that you believe may assist the Owner in deciding that your firm is best qualified for the Project.

ENSURING SUCCESS

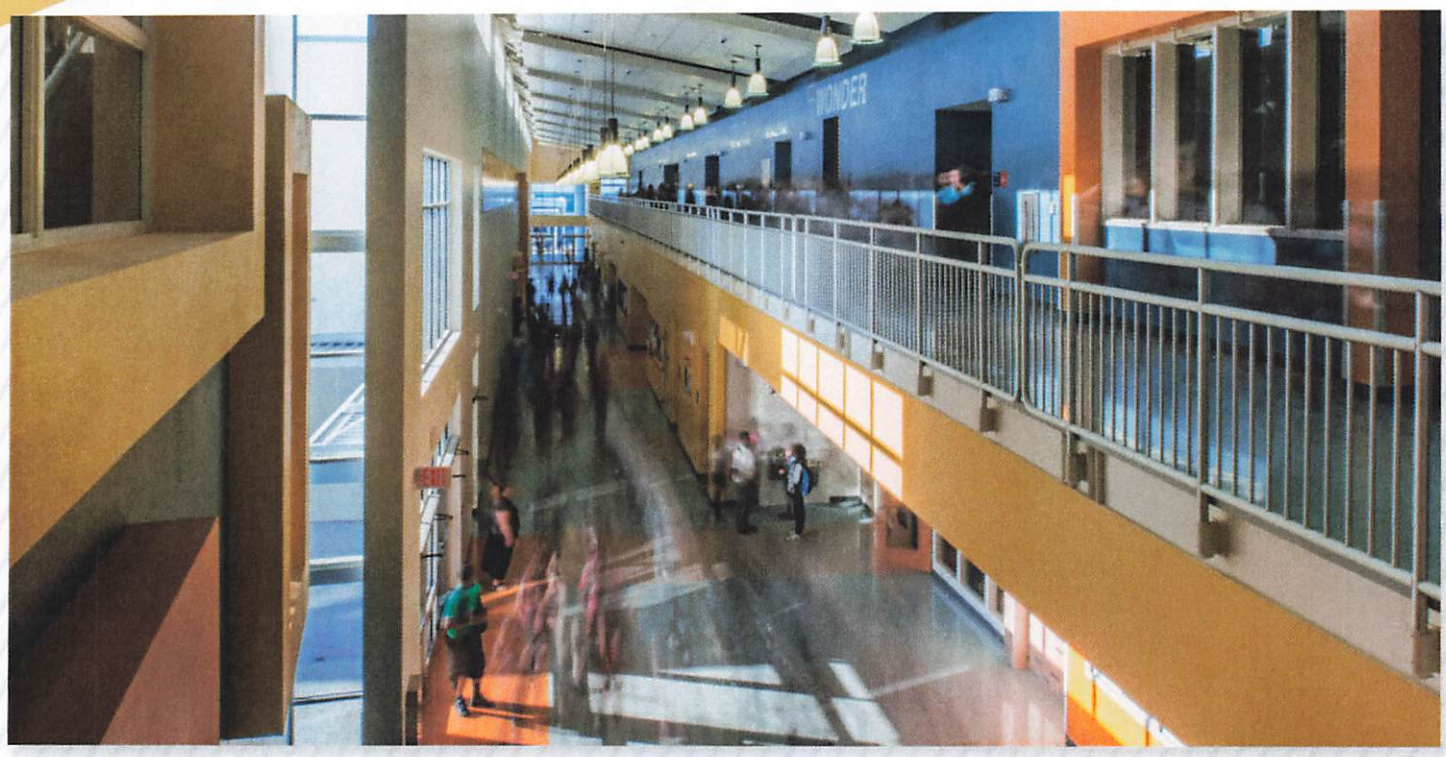
Each member of our team has proven they possess the personal characteristics to meet not only an Owner's expectations, but CPPI's expectations. Our team believes in continuing our legacy of providing quality construction services. Approaching each project with open communication, organization, attention to detail, and a strong work ethic, we offer you a team that will deliver a successful project to your students, staff, and community.



Our proposed team's special characteristics include:

- **Open Communication** – We understand the importance of keeping the students, staff, and community informed while aligning with the goals of the Beaufort County School District.
- **Collaboration** – Our team has the ability to work closely with campus staff to provide smooth campus operation while critical construction activities are ongoing.
- **Coordination** - Our proposed team does an exceptional job in coordinating, forecasting and communicating upcoming activities related to construction and how to avoid potential pitfalls related to construction.
- **Excellent Subcontractor Relationships** - Our team has worked extensively with a large network of subcontractors and will be able to provide the best value for this project.
- **Dedication** – Our team is committed to these projects throughout the duration of the contract.
- **MEPFP Coordinator** - We have a full time in-house MEPFP Coordinator that is dedicated to the systems review and coordination during design and construction.
- **Sustainable Construction** - Experience with LEED accreditation practices, multiple LEED Accredited Professionals on our proposed teams.
- **Scheduling** – Our team understands the importance of the schedule and how to expedite schedules for an on-time completion of projects.
- **Occupied Campuses** – Our team has a deep understanding of working on occupied campuses for multiple phased renovation and addition projects with the least amount of impact to the daily activities of the campus. Safety of students and staff is our priority.
- **Quality** – CPPI has a commitment to quality while offering the best value by engaging the Beaufort County School District's personnel and subcontractors in the analysis of all information related to design, cost management, schedule, and the sensitivity of construction activities.
- **Commitment** – The CPPI team won't disappear when the project is complete. We offer you a strong track record of reliability and continued service on completed projects.

- Any other information that you believe may assist the Owner in deciding that your firm is best qualified for the Project.



Commitment. Integrity. Teamwork. Excellence. Stewardship.

We're passionate about the work we do because the structures we build provide opportunities to learn, train, heal, grow, and lead. Construction is the heart of America - a country known for buildings that energize and inspire. It's a privilege to be a part of it. To work in an industry whose veins run deep through the streets of our cities and hometowns. To turn brick and mortar into shelter and safety. To build something greater than ourselves.

RELATIONSHIPS – We've built upon a cornerstone of reliability, quality and honesty to establish valued working relationships with clients and construction professionals.

PRINCIPAL INVOLVEMENT – The Team's principals are directly involved on each and every project.

EMPLOYEE DEDICATION – Your job will be managed by individuals who take pride in their work and responsibility for their decisions. We work in concert, with mutual appreciation and respect being the hallmark of our team.

COMMITMENT TO QUALITY & COST EFFECTIVENESS – Our experience in delivering quality while carefully measuring value will maximize your investment dollar.

We don't disappear when the project is complete. - We offer you a strong track record of reliability and continued service on completed projects.

Thank you for the opportunity to submit our qualifications.
We believe that our experience, expertise, and capabilities make CPPI the best choice to be your partner for your project.

Business Utilization Report

In order to facilitate an effective monitoring system, each contractor, bidder or offeror must submit a completed and signed Utilization Report with the bid submission which lists the names, addresses and contact persons of the M/WBE and majority owned businesses, if any, to be used in the contract, the type of work each business will perform, the dollar value of the work and the scope of work. The Utilization Report submitted by the contractor shall be submitted as a part of the contract with BCSD. If the information contained in the Contractor's Utilization Report changes by the time the contract is executed, the Contractor shall amend the Utilization Report and such amended Utilization Report shall be incorporated into the contract.

Business Enterprise Utilization Report

List all vendors/subcontractors to be used on this project. If the M/WBEs proposed for utilization on this project are certified by the Small and Minority Business Assistance Office through the State of South Carolina according to the criteria of the Beaufort County School District's Minority Business Enterprise Plan prior to utilization on this project, please list those firms below. A list of certified vendors through the South Carolina Division of Small and Minority Business Contracting and Certification can be found here: https://osmba.sc.gov/directory.html

Sub-Contractor Name	M/WBE Certification #	Address	Phone #	Other	E-Mail
TBD upon project award					

Statement of Intent

We, the undersigned, have prepared and submitted all the documents required for this project. We have prepared these documents with a full understanding of the Beaufort County School District's goal to ensure equal opportunities in the proposed work to be undertaken in performance of this project. Specifically, the BCSD seeks to encourage and promote on an inclusionary basis contracting opportunities without regard to the race, gender, national origin or ethnicity of the ownership or management of any business and that it is an equal opportunity employer and contracting entity. We certify that the representations contained in the Minority/Woman Business Enterprise (M/WBE) Utilization Report, which we have submitted with this solicitation, are true and correct as of this date. We commit to undertake this contract with the Minority/Woman Business Utilization Report we have submitted, and to comply with all non-discrimination provisions of the Minority/Woman Business Enterprise Program in the performance of this contract.

Signature

November 13, 2023

Date

Name: Jason Morgan

Title: Executive Vice President / Principal

Project: Construction Management At-Risk Services for
Renovation and Modifications Projects
October 2023 - December 2025

CPPI is an established entity in Hilton Head - Account #25463.

CPPI is currently doing work in Beaufort County. Beaufort County documentation can be provided upon request. CPPI will purchase any additional business licenses necessary upon project award.

CCB 1073134

SOUTH CAROLINA DEPARTMENT OF LABOR, LICENSING AND REGULATION

CONTRACTOR'S LICENSING BOARD

LICENSE#: CLG.120758 LICENSE#: CLG.120758

CHARLES PERRY PARTNERS INC
8200 NW 15TH PLACE
GAINESVILLE FL 32606

Has been qualified by the laws of the State of South Carolina and is duly entitled to practice as a:

GENERAL CONTRACTOR

for each Classification and Group Limitation listed below:

Building-BD5

(If this license has a "Limited Building" classification, licensee is limited to 3 stories in height)

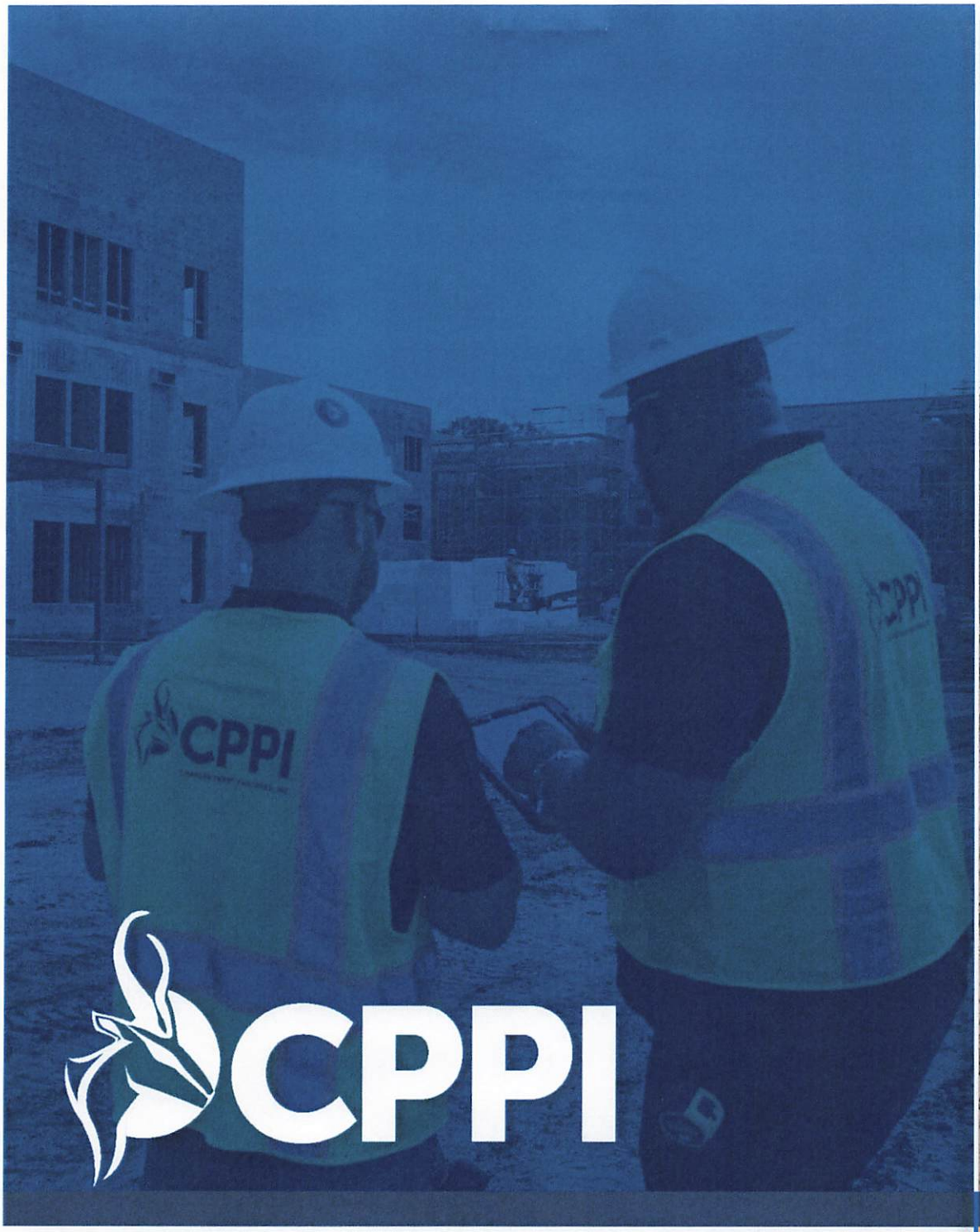
LICENSE NUMBER: CLG.120758
Initial License Date:.....04/24/2017
EXPIRATION DATE:.....10/31/2024

Molly L Dunn
Administrator

Group Limitation Amounts Per Job:
Group #1 - $50,000 Group #2 - $200,000
Group #3 - $500,000 Group #4 - $1,500,000
Group #5 - $Unlimited

Qualifying Party(s): DAVID W HAMILTON

(It is **at the discretion** of this licensee to designate whomever they choose to pull permits and conduct business in their behalf.)





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