













WHERE LEARNING LEADS THE WAY

BEAUFORT COUNTY SCHOOL DISTRICT

CONSTRUCTION MANAGEMENT AT-RISK SERVICES

LADY'S ISLAND MIDDLE SCHOOL - REPLACEMENT ON ACTIVE CAMPUS

AND

EARLY CHILDHOOD CENTER IN BLUFFTON - NEW BUILD

RFP 25-004

CPPI

AUGUST 29, 2024

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Beaufort County School District

Solicitation Number:	25-004
Date Printed:	July 16, 2024
Date Issued:	July 31, 2024
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 – Lady's Island Middle School – Replacement School on Active Campus and Early Childhood Center in Bluffton – New Build**

SUBMIT OFFER BY (Opening Date & Time): August 29, 2024 @ **4:00 PM EST**

QUESTIONS MUST BE RECEIVED BY: August 22, 2024 @ **4:00 PM EST**

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 ADDRESSE 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 **September 1, 2024.** 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) **Charles Perry Partners, Inc.**

ENTITY TYPE: **Corporation**

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

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.

PAGE TWO

(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** **(352) 333-9292**	**1464 E. Victory Dr.** **Savannah, GA 31404** **(912) 232-4544**
PHONE NUMBER:	
EMAIL ADDRESS:	

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** **2**	**August 21, 2024** **August 26, 2024**

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:	25-004
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Jason Morgan

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Jason Morgan
PRINTED NAME

Executive Vice President / Principal
TITLE

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Beaufort County School District

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Addendum 2	Date Issued:	August 26, 2024
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Jason Morgan Executive Vice President / Principal

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August 29, 2024

Beaufort County School District
Ms. Kaylee Yinger, Procurement Officer
2900 Mink Point Blvd
Beaufort, SC 29902

RE: RFP #25-004 Construction Management at-Risk Services
Lady's Island Middle School – Replacement School on Active Campus and Early Childhood Center in Bluffton – New Build

Dear Ms. Yinger and Members of the Selection Committee,

"Through a personalized learning approach, the Beaufort County School District will prepare graduates who compete and succeed in an ever-changing global society and career marketplace." For the Beaufort County School District (BCSD), learning meets innovation, and endless possibilities are created for every student to excel. Charles Perry Partners, Inc. (CPPI) is the construction management firm to help fulfill this mission. We are excited to submit our qualifications for your two projects. As documented on the following pages, we are qualified and ready to deliver an exceptional project for BCSD within your budget and schedule, while identifying opportunities for savings and value throughout the process.

CPPI was founded in 1968, and for nearly 56 years, education construction has been a pillar of our business. ***We have built more than $1.5 billion of K-12 educational facilities encompassing more than 6.2 million square feet across the Southeastern United States, including projects in South Carolina, Georgia, and Florida. Additionally, CPPI has completed more than 1,000 CM at-Risk projects.***

CPPI offers Beaufort County School District an A+ K-12 construction team for your projects. Our core team of Mark Brown, Project Manager, and Dale Wicker, Superintendent, has worked together extensively on K-12 projects, including multiple replacement projects on active campuses. Mark and Dale have both recently worked in Beaufort County on educational projects. Rich Pritt will serve as the Senior Project Manager and provide oversight and leadership. Rich has recently completed multiple K-12 projects for Savannah-Chatham County Public School System and is currently closing out a replacement campus project for Duval County Public Schools. Our team will be led by David Hamilton as Project Executive. David has served in the same capacity for numerous projects for BCSD, and understands your expectations. He will be involved throughout the duration of the project.

WHAT MAKES CPPI THE BEST CHOICE FOR YOUR PROJECTS:

- *We are K-12 experts, with a proposed project team that has dedicated the majority of their careers to building schools.*
- *We have experience working in Beaufort County and have knowledge of the AHJ's.*
- *We are currently working with Beaufort County School District and understand your expectations.*
- *We specialize in building facilities on bustling, educational campuses with a proven ability to complete projects on time and within budget.*
- *We have proven working relationships with the regional local subcontractor workforce and are a company that believes in giving back to the communities where we work.*
- *We have a strong track record of completing projects on time and within budget.*

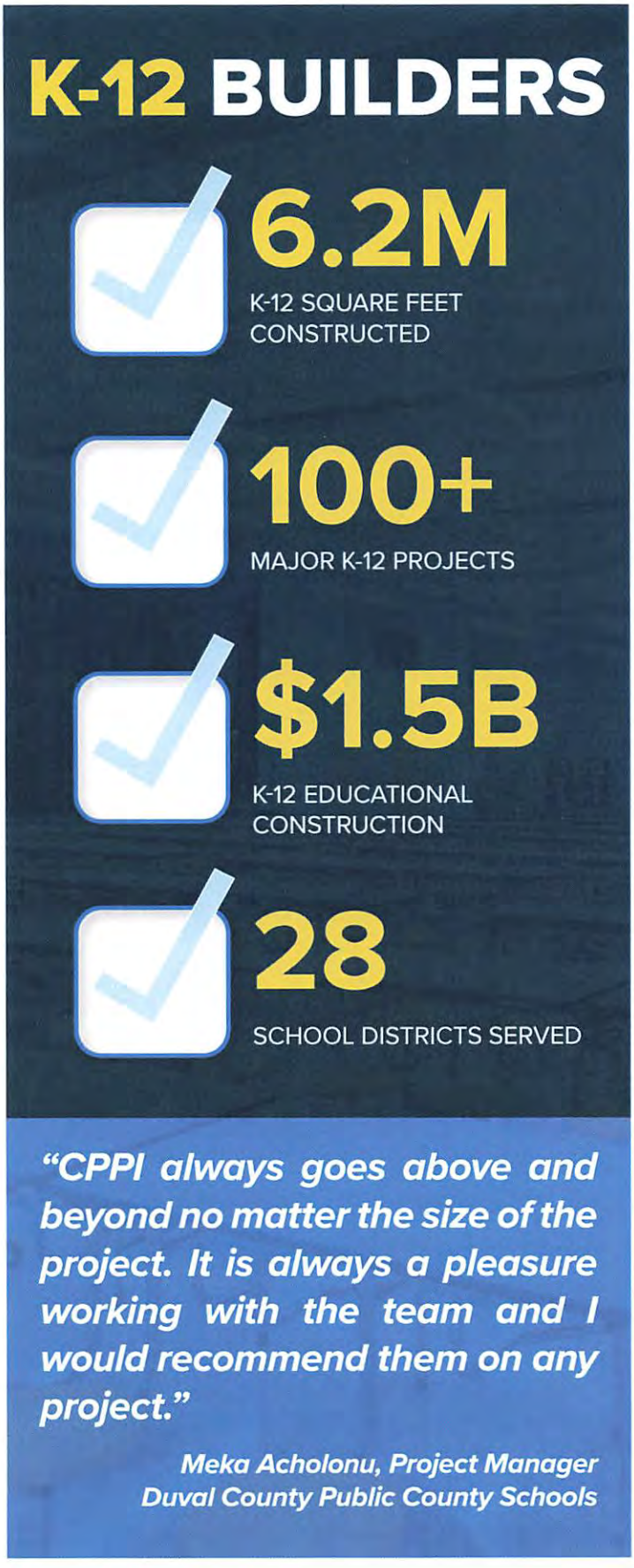
All of our proposed preconstruction and construction professionals have successfully delivered K-12 projects similar to yours, and thus, bring proven experience to BCSD. We will work closely with you and your team to ensure all goals are met and each project awarded to CPPI is successfully completed.

In closing, you have my personal commitment to bring CPPI's talented resources to this contract 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, where learning meets innovation, and endless possibilities.

Sincerely,

Jason Morgan, Executive Vice President / Principal
Charles Perry Partners, Inc.

- *Firm Name*
- *Firm Address*
- *History of company, including ownership and key management*



Firm Name
Charles Perry Partners, Inc.

Firm Address
1464 E. Victory Dr.
Savannah, GA 31404

2024 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 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 three active principals, each with more than 20 years of service with the firm. This ownership includes:

- Brian Leslie, President - 30 Years with CPPI
- Jason Morgan, Executive Vice President - 20 Years with CPPI
- Vinnie Moreschi, Executive Vice President - 24 Years with CPPI

CPPI is a Construction Management, Design Build, and General Contracting firm with over 200 employees. The firm is a leader in sustainability and is dedicated to the communities in which it serves.

TRUST BUILT ON PERFORMANCE

- *Contact information for the Officer of the Firm in charge of this Proposal*
- *Describe any company changes that are anticipated to occur during the life of the Project*
- *Location of corporate headquarters and other divisional offices*
- *Location of office(s) which will be involved in the project during both pre-construction and construction*

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 your project.



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

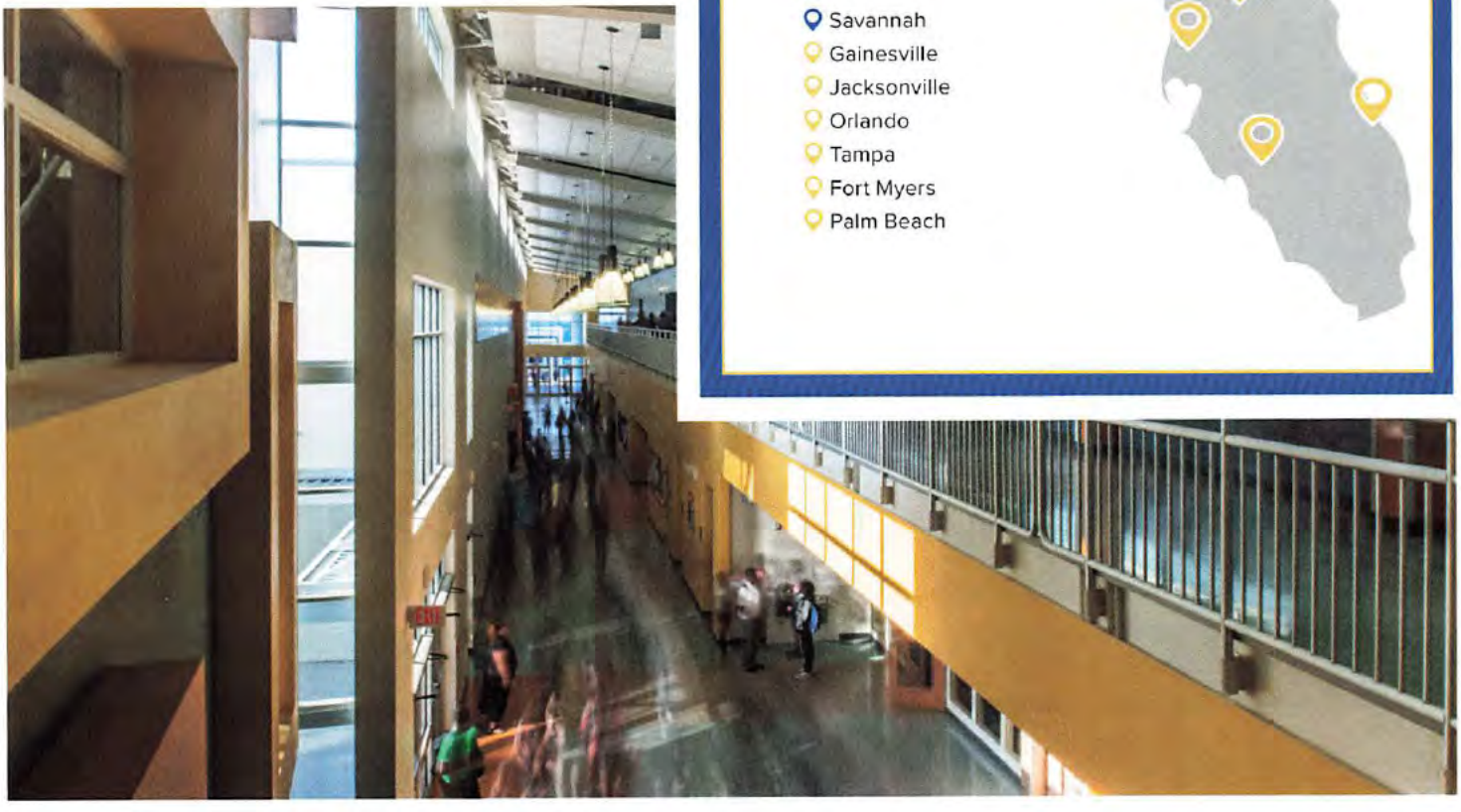
The Lady's Island Middle School and Early Childhood Center projects will be managed from CPPI's Savannah office, which has previously managed projects for Beaufort County School District.

Our office is located at:

1464 E. Victory Dr.
Savannah, GA 31401

Additional resources from all of CPPI's offices are available as needed for the project.

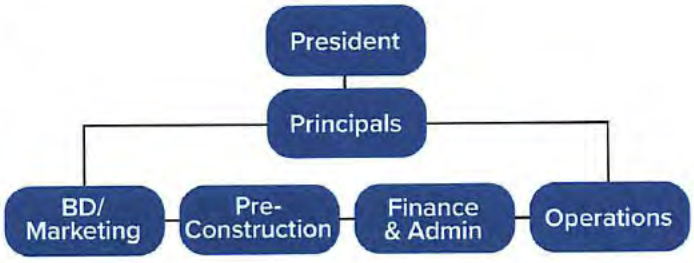




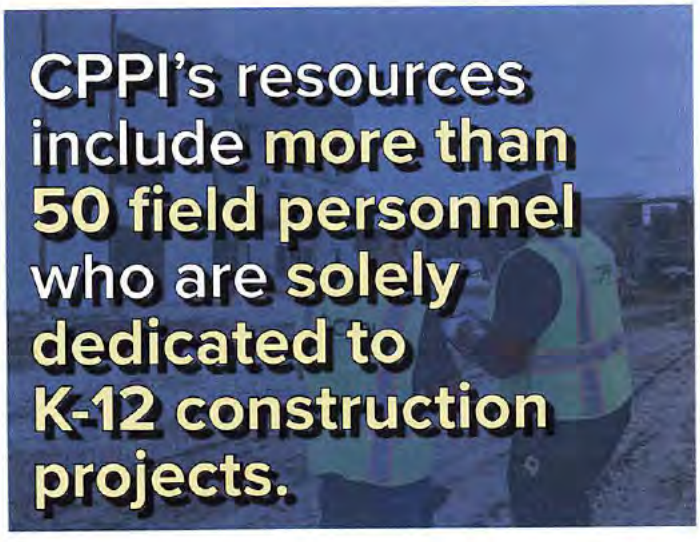
• Organizational chart of the company, showing authority, structure, and depth of resources
• Vendor References: References must be for the proposer's firm that has provided verifiable commercial accounts of the approximate size and locations of the District for the past 24 – 36 months. Please provide name, address, telephone number, e-mail address and a contact person for each reference. Please submit five (5) references.

Organizational Structure

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



DEPTH OF RESOURCES	
ROLE	**STAFF #**
Project Managers	69
Field Superintendents	72
Skilled Craft Personnel	9
Estimators	11
Scheduling Experts	1
Executives	15
Principals	3
Administration / Marketing	22
Interns	9
	211



Vendor References

[redacted]

WHAT OUR TRADE PARTNERS ARE SAYING:

"CPPI has been a reliable partner with us for over forty years. **They have a reputation as a firm that shares our commitment to excellence."**

Brian Hines
Miller Electric Company

"CPPI has consistently honored their commitments with us, and we value our working relationship. **They are an excellent example of how a contractor should conduct their selves,** and we have enjoyed a long-standing professional relationship."

Wayne Durban
W.W. Gay Mechanical

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

PRINCIPAL OVERSIGHT



[redacted]

- K-12 Construction Expert
- Regional Construction Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

JASON MORGAN

PRINCIPAL IN CHARGE

[redacted]

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

TEAM LEADER



DAVID HAMILTON

PROJECT EXECUTIVE

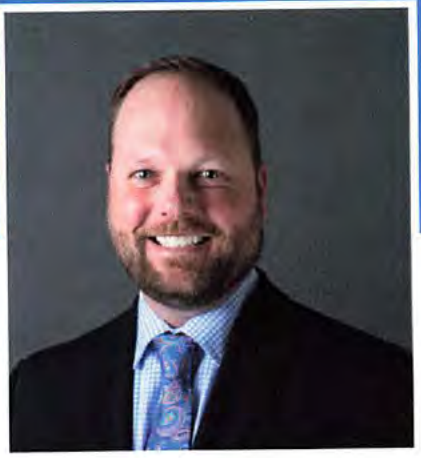
[redacted]

[redacted]

- BCSD Experience
- Beaufort County Experience
- SC Office of State Facilities Experience
- K-12 Construction Experience

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

PRECONSTRUCTION LEAD



[redacted]

- K-12 Preconstruction Experience
- Beaufort County Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

JAKE PLEIN

VICE PRESIDENT OF PRECONSTRUCTION

[redacted]

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

PRECONSTRUCTION



KEVIN BRADFORD

DIRECTOR OF PRECONSTRUCTION

[redacted]

[redacted]

- K-12 Preconstruction Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

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

PRECONSTRUCTION



MATT MCCORMIC

PROJECT MANAGER (PRECONSTRUCTION)

[redacted]

[redacted]

- BCSD Experience
- Beaufort County Experience
- SC Office of State Facilities Experience
- K-12 Construction Experience

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

DAILY MANAGEMENT LEAD



[redacted]

- K-12 Construction Expert
- Regional Construction Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

RICH PRITT

SENIOR PROJECT MANAGER

[redacted]

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

DAILY MANAGEMENT



MARK BROWN

PROJECT MANAGER (CONSTRUCTION)

[redacted]

- K-12 Construction Expert
- BCSD Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

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

FIELD SUPERVISION



DALE WICKER

SENIOR SUPERINTENDENT

[redacted]

- K-12 Construction Expert
- Beaufort County Experience
- K-12 Replacement Experience
- New K-12 Build Experience
- Active K-12 Campus Experience

• *Include an organizational chart identifying key individuals and their responsibilities.*

K-12 EXPERTS

CPPI's Savannah office will be responsible for all phases of your project. We have the resources of our entire organization at our disposal, with a team of over 200 employees available to assist as needed. Selecting the right team is crucial for any project's success. Your project requires a well-planned, tightly coordinated approach from preconstruction to completion, delivered by a team experienced with both new greenfield K-12 construction and replacement school construction on an occupied campus. As one of the region's largest educational builders by volume, CPPI has the experience and proposed team members who have completed similar projects.

WHERE LEARNING LEADS THE WAY
BEAUFORT COUNTY SCHOOL DISTRICT

EXECUTIVE LEADERSHIP

JASON MORGAN
Principal in Charge



- Executive oversight
- Allocate corporate resources

TEAM LEADER

DAVID HAMILTON
Project Executive
POINT OF CONTACT



- Project leadership
- Team alignment

PRECONSTRUCTION

JAKE PLEIN
VP of Preconstruction



- Lead the coordination of all precon activities
- Value management

PROJECT MANAGEMENT

RICH PRITT
Senior Project Manager



- Contract and quality management
- Oversight of daily project management

PRECONSTRUCTION

KEVIN BRADFORD
Director of Preconstruction



- GMP development
- Material procurement

PROJECT MANAGEMENT

MARK BROWN
Project Manager (Construction)



- Manages buy-out process
- Leads on-site project management

PRECONSTRUCTION

MATT MCCORMIC
Project Manager (Preconstruction)



- Constructability review
- Material procurement

FIELD MANAGEMENT

DALE WICKER
Senior Superintendent



- Responsible for all field operations
- Develops and manages schedule

VALUE-ADDED RESOURCES

Core Safety Group
Safety Consultant



Traci Amberbride
Community / MBE Outreach



Lee Hall
MEP/FP Coordinator



Christine Rushworth
Project Accountant & ODP Coordinator

ADDITIONAL TEAM MEMBERS

Project Engineer - TBD
Assistant Superintendent - TBD

• *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 Project Executive	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					
Kevin Bradford Director of Preconstruction	X	X	X	X	X	X	X	X					
Matt McCormic Project Manager (Preconstruction)	X	X	X	X	X	X	X	X					
Rich Pritt Senior Project Manager	X	X	X	X	X	X	X	X	X	X	X	X	X
Mark Brown Project Manager (Construction)	X	X	X	X	X	X	X	X	X	X	X	X	X
Dale Wicker Senior Superintendent	X	X	X	X	X	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
Lee Hall MEPFP Coordinator / Cx	X	X					X	X			X	X	
Core Safety Group Safety Consultant					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	PERCENTAGE OF TIME ON YOUR PROJECT
David Hamilton VP / Regional Manager	Regional Manager for all Georgia and South Carolina Projects - No Specific Assignment	Preconstruction: 30% Construction: 25% Post-Construction: 25%
Rich Pritt Senior Project Manager	Duval County Public Schools Highlands Elementary School; Completion Date: September 2024 (project close-out) HCA Oakleaf Free Standing ER Completion Date: August 2025	Preconstruction: 50% Construction: 50% Post-Construction: 50%
Mark Brown Project Manager	School District of Osceola County - Freezer Cooler Renovation; Completion Date: September 2024 School District of Osceola County - Transportation Facility; Completion Date: October 2025	Preconstruction: 20% Construction: 100% Post-Construction: 25%
Dale Wicker Senior Superintendent	Rendina / UF Health Clermont FSER; Completion Date: October 2024 School District of Osceola County - Transportation Facility; Completion Date: October 2025	Preconstruction: 25% Construction: 100% Post-Construction: 25%
Kevin Bradford Director of Preconstruction	Director of Preconstruction - No Specific Assignment	Preconstruction: 50% 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 Projects - No Specific Assignment	Preconstruction: 30% Construction: 10% Post-Construction: 0%
Matt McCormic Project Manager (Preconstruction)	Beaufort County School District Capital Improvements; Completion Date: Ongoing	Preconstruction: 50% Construction: 0% Post-Construction: 0%

OUR TEAM IS AVAILABLE AND COMMITTED TO BCSD



• 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 maintaining 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 and Kevin Bradford with significant input from David Hamilton. Matt McCormic will serve as the Project Manager for the preconstruction phase. Jason Morgan will provide Principal oversight.

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. Dale Wicker will be reponsible 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.



DEDICATED K-12 TEAM



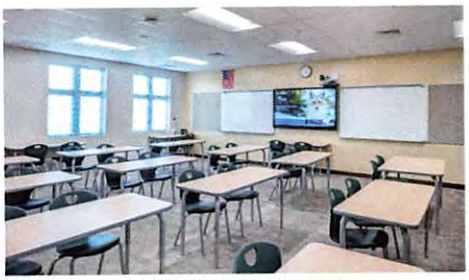
EXPERIENCE AS PART OF A SIMILAR TEAM

All members of our proposed project team have extensive experience with K-12 preconstruction and construction. Our team has collectively completed more than 75 K-12 projects. Shown below are recent K-12 projects that have been completed by members of our project team.



GROVES 6-12 SCHOOL

75+
collective K-12 projects completed



PALM VALLEY ACADEMY K-8



WESTRIDGE MIDDLE SCHOOL



NEW HAMPSTEAD K-8



HIGHLANDS ELEMENTARY SCHOOL



ESE CAMPUS CONSOLIDATION



VISTA POINTE ELEMENTARY SCHOOL



SALLY RIDE ELEMENTARY SCHOOL



ISLE OF HOPE K-8 SCHOOL



HAVEN ELEMENTARY SCHOOL



GREENWOOD LAKES MIDDLE SCHOOL

• *Describe your previous experience in providing similar services as described above.*

CPPI
CHARLES PERRY PARTNERS, INC

6.2M+

SQUARE FEET

EDUCATION

Construction for K-12

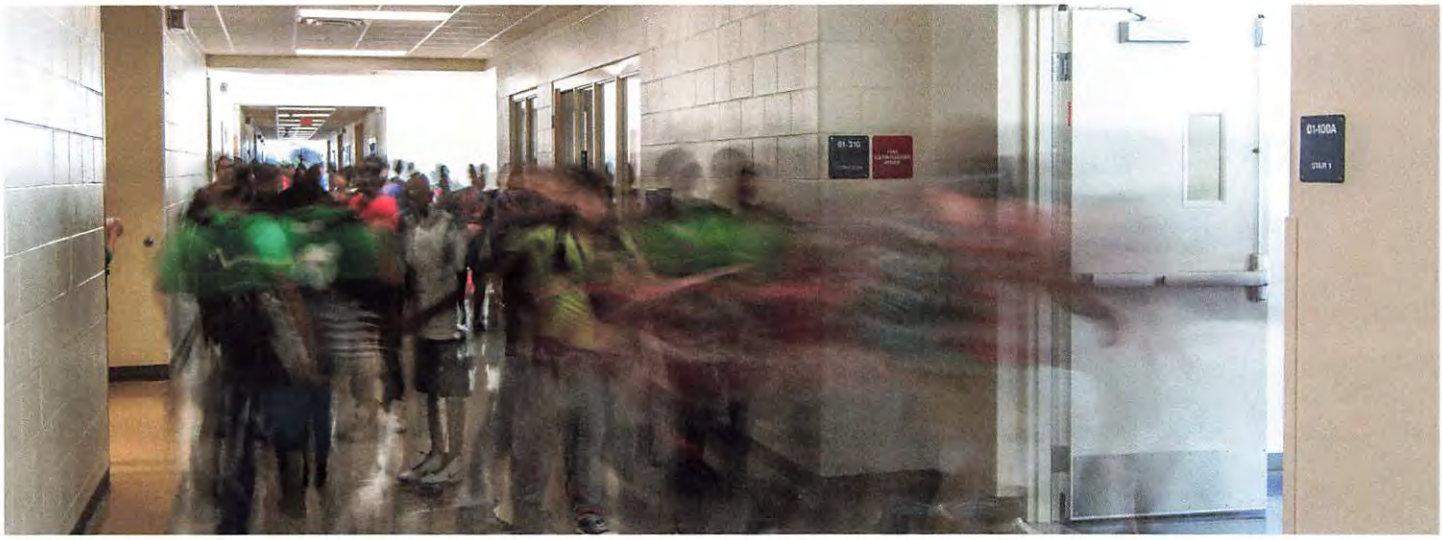


THE EXPERIENCE TO SERVE BEAUFORT COUNTY SCHOOL DISTRICT

Over the course of 56 years of construction industry experience, CPPI has established itself as an educational facility builder. We have completed more than 100 major K-12 projects worth more than **$1.5 BILLION** for 28 different school districts.

With this depth of experience and with our strong management capabilities, we have an intuitive understanding of what it will take to make your project a success. We have never missed a K-12 completion date and the facility has always been ready to open when that school bell rings; your project will be no exception.

CPPI has built a wide range of educational facilities. From ground-up campuses to renovated classrooms and mechanical systems replacements, our teams have done it all. Please see the following pages for more information about some of our most relevant projects to the Lady's Island Middle School and Early Childhood Center projects.



Provide a minimum of three references of similar projects for these services.

K-12 REFERENCES

OCPS

DUVAL COUNTY PUBLIC SCHOOLS

Alachua County Public Schools

TECHNICAL COLLEGE OF THE LOWCOUNTRY

[redacted]



ESE CAMPUS CONSOLIDATION



HIGHLANDS ELEMENTARY SCHOOL



IDYLWILD ELEMENTARY SCHOOL



CULINARY INSTITUTE OF THE SOUTH



9TH GRADE CENTER

Seminole County Public Schools

"CPPI has proven to be a valuable asset to our school district. Their work has positively impacted our community, enhancing the environmental environment for our students and staff."

Paul Tweed, Project Manager
Seminole County Public Schools

- *For the past three years, provide the following information:*
  - *a. Identify all projects (name, location, completion date and Contract amount).*
  - *b. Identify all modification and 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;*
    - *vi. Identify all projects (description and cost) which had a Guaranteed Maximum Price prior to completion of the documents.*

CPPI PROJECTS: PAST 3 YEARS

Project Name / Location / Completion Date / Contract Amount	Modification or New Construction?	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?
UF Health Ocala Neighborhood Hospital Ocala, FL Completion Date: June 2024 Contract Amount: $64.5M	New	No	No	No	Negotiated Fee	No
City of Plant City Tennis Center Plant City, FL Completion Date: May 2024 Contract Amount: $3.7M	New	No	No	No	Guaranteed Maximum Price	No
America's Second Harvest of Coastal Georgia Savannah, GA Completion Date: February 2024 Contract Amount: $40.5M	New	No	No	No	Negotiated Fee	No
HCA Gainesville FSER Gainesville, FL Completion Date: February 2024 Contract Amount: $9.9M	New	No	No	No	Negotiated Fee	No
St. Petersburg College Workforce Incubator Tarpon Springs, FL Completion Date: February 2024 Contract Amount: $4.2M	Modification	No	No	No	Guaranteed Maximum Price	No
HCA Casselberry FSER Gainesville, FL Completion Date: February 2024 Contract Amount: $8.3M	New	No	No	No	Negotiated Fee	No
HCA Interstate FSER Ocala, FL Completion Date: February 2024 Contract Amount: $7.7M	New	No	No	No	Negotiated Fee	No
HCA St. Cloud FSER St. Cloud, FL Completion Date: February 2024 Contract Amount: $7.7M	New	No	No	No	Negotiated Fee	No
Twin Cities Hospital ED Expansion & Renovation Niceville, FL Completion Date: December 2023 Contract Amount: $9.8M	Modification & New	No	No	No	Negotiated Fee	No
Cypress Elementary School HVAC Renovation Kissimmee, FL Completion Date: August 2023 Contract Amount: $4.3M	Modification	No	No	No	Guaranteed Maximum Price	No
Citizen's Center Interior Renovation New Port Richey, FL Completion Date: July 2023 Contract Amount: $4.7M	Modification	No	No	No	Negotiated Fee	No

CPPI PROJECTS: PAST THREE YEARS

Project Name / Location / Completion Date / Contract Amount	Modification or New Construction?	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?
Memorial Hospital of Jacksonville Hybrid OR Renovation / MRI Bi-Plane Jacksonville, FL Completion Date: July 2023 Contract Amount: $6.2M	Modification	No	No	No	Negotiated Fee	No
Veve Cottages at Archer Road Orlando, FL Completion Date: June 2023 Contract Amount: $30M	New	No	No	No	Guaranteed Maximum Price	No
SiVance Modular Manufacturing Units Gainesville, FL Completion Date: June 2023 Contract Amount: $17.6M	New	No	No	No	Guaranteed Maximum Price	No
Osceola Hospital Lobby Expansion Orlando, FL Completion Date: March 2023 Contract Amount: $8.7M	New	No	No	No	Guaranteed Maximum Price	No
Dunn Village Free Standing ED Jacksonville, FL Completion Date: February 2023 Contract Amount: $7.7M	New	No	No	No	Negotiated Fee	No
Hillsborough Community College New District Admin Building, Tampa, FL Completion Date: February 2023 Contract Amount: $16.9M	New	No	No	No	Guaranteed Maximum Price	No
Lane Avenue Free Standing ER, Jacksonville, FL Completion Date: January 2023 Contract Amount: $7.7M	New	No	No	No	Negotiated Fee	No
NCSD Yulee High School Addition, Yulee, FL Completion Date: January 2023 Contract Amount: $11.5M	New	No	No	No	Negotiated Fee	No
UF Health Florida Surgical Center OR #14 Renovation, Gainesville, FL Completion Date: August 2022 Contract Amount: $.8M	Modification	No	No	No	Guaranteed Maximum Price	No
Livestock & Pultry – Turkey Grow-Out and Broiler Grow-Out Facilities, Blacksburg, VA Completion Date: August 2022 Contract Amount: $5.8M	New	No	No	No	Negotiated Fee	No
SBAC Idylwild ES Redesign & Redevelopment, Gainesville, FL Completion Date: August 2022 Contract Amount: $16.2M	Modification / New	No	No	No	Guaranteed Maximum Price	No
Trenton High School Cafetorium, Trenton, FL Completion Date: August 2022 Contract Amount: $9.5M	New	No	No	No	Negotiated Fee	No
Campus Landscape Master Plan, Gainesville, FL Completion Date: June 2022 Contract Amount: $3.9M	Modification	No	No	No	Guaranteed Maximum Price	No
Concentrix Building 285 Renovations, Orlando, FL Completion Date: April 2022 Contract Amount: $8.9M	Modification	No	No	No	Guaranteed Maximum Price	No

CPPI PROJECTS: PAST THREE YEARS

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?
Blake Medical Center Surgery Expansion / ICU Renovation, Bradenton, FL Completion Date: April 2022 Contract Amount: $22.9M	Modification / New	No	No	No	Guaranteed Maximum Price	No
Soccer & Lacrosse Stadium Expansion & Improvements, Gainesville, FL Completion Date: April 2022 Contract Amount: $5.7M	Modification / New	No	No	No	Guaranteed Maximum Price	No
Reunion Village Free Standing Emergency Room, Orlando, FL Completion Date: April 2022 Contract Amount: $8.9M	New	No	No	No	Guaranteed Maximum Price	No
LewisGale Medical Center Blue Hills Free Standing ER, Roanoke, VA Completion Date: March 2022 Contract Amount: $5.9M	New	No	No	No	Guaranteed Maximum Price	No
Capital Regional Medical Center Rehab / NICU Expansion / Bi-Plane Addition, Tallahassee, FL Completion Date: March 2022 Contract Amount: $20M	Modification / New	No	No	No	Guaranteed Maximum Price	No
Largo Regional Medical Center Facility Upgrades & Renovation, Largo, FL Completion Date: February 2022 Contract Amount: $6M	Modification	No	No	No	Guaranteed Maximum Price	No
Harvest Building C Indoor Grow Facility – Phase I, Alachua, FL Completion Date: December 2021 Contract Amount: $12.7M	Modification	No	No	No	Guaranteed Maximum Price	No
Florida Surgical Center 23-Hour Unit Addition, Gainesville, FL Completion Date: December 2021 Contract Amount: $5.6M	Modification	No	No	No	Guaranteed Maximum Price	No
New Hampstead K-8, Savannah, GA Completion Date: December 2021 Contract Amount: $38.5M	New	No	No	No	Negotiated Fee	No
Orange Grove Elementary School Phase II, Seminole, FL Completion Date: December 2021 Contract Amount: $14.2M	Modification / New	No	No	No	Guaranteed Maximum Price	No
Reitz Union Lawn Inner Road Thermal Utilities, Gainesville, FL Completion Date: November 2021 Contract Amount: $3.9M	Modification	No	No	No	Guaranteed Maximum Price	No
Lowcountry Culinary Arts Institute & Interpretive Center, Beaufort, SC Completion Date: November 2021 Contract Amount: $11M	New	No	No	No	Negotiated Fee	No
James Marlowe Elementary School Classroom Building Addition & School Remodel, New Port Richey, FL Completion Date: October 2021 Contract Amount: $7.1M	Modification / New	No	No	No	Guaranteed Maximum Price	No

c. 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.







Orlando, FL

ORANGE COUNTY SCHOOLS

ESE CAMPUS CONSOLIDATION - SILVER PINES / MAGNOLIA SCHOOLS

K-12 EDUCATION

OCCUPIED CAMPUS

REPLACEMENT PROJECT

SIZE

TIGHT SITE

SCOPE

This project consisted of the replacement of the existing and aged Magnolia School and the construction of the new Silver Pines Academy on an adjacent parcel. Aside from a shared exercise track, the schools have separate identities, addresses, and facilities on the same campus. The Magnolia School replacement school project called for a new, 73,000 SF one-story, new specialized learning building that serves more than 160 students ranging in ages from 12-22 with significant, cognitive, physical or behavioral disabilities, or a combination of these. The Silver Pines Academy is a new facility focusing on the needs of 120 kindergarten to grade twelve students with emotional and behavioral disorders. The new facility is approximately 86,800 GSF of new buildings. Additional work on this project included improvement and expansion of the existing entry drive, new parking areas, new parent loops, new bus loops, athletic facilities, playgrounds, exterior walkways and canopies, underground utilities, storm water retention, landscaping and irrigation, and site lighting.

KEY PERSONNEL INVOLVED



[redacted]

c. 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.











c. 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.

CASE STUDY

This project consisted of the replacement of the existing and aged Magnolia School and the construction of the new Silver Pines Academy on an adjacent parcel. Aside from a shared exercise track, the schools have separate identities, addresses, and facilities on the same campus.

The Magnolia Academy replacement school project called for a new, 73,000 SF one-story specialized learning building that would serve more than 160 students, ages 12 to 22, with significant cognitive, physical, or behavioral disabilities or a combination of these.

The Silver Pines Academy is a new facility focusing on the needs of 120 kindergarten to grade twelve students with emotional and behavioral disorders. It is approximately 86,800 GSF and consists of new buildings.

Additional work on this project included improving and expanding the existing entry drive, creating new parking areas, creating new parent loops, creating new bus loops, creating athletic facilities, playgrounds, exterior walkways and canopies, underground utilities, storm water retention, landscaping and irrigation, and site lighting.

INNOVATIVE PROGRAMS RELATED TO QUALITY CONTROL

CPPI created an isolated equipment containment area on the project site designated for prefabrication. Our subcontractors could put select components of the project together in this area. Our site superintendents were then able to inspect the finished setup before installation to ensure quality workmanship, and accuracy, and to keep construction work on time and within budget.

INNOVATIVE PROGRAMS RELATED TO SCHEDULING

This project aimed to replace the existing Magnolia School and build a new school on the same campus, with both schools having separate identities, addresses, and facilities on campus. The first phase consisted of constructing a new school on the same campus as an existing school. Once the new Magnolia School was complete, the students and staff from the existing facility were moved into the new building.



Following this move into the new school, the previous Magnolia School was demolished and replaced with a new facility, the Silver Pines Academy Learning Center.

Students attending the Magnolia School are 12-22 with significant cognitive, physical, or behavioral disabilities, and CPPI was sensitive to the specific needs of these students regarding our construction activities. Our team understood that it was critical for our construction activities to maintain rigorous safety standards and not impact the existing Magnolia School operations in any way. CPPI worked closely with the Magnolia School and Orange County Public Schools to develop a greater understanding of how the school functioned daily to best develop our project schedule in a way that would not impact the students and the function of the school. We updated our schedule weekly and communicated daily with the Magnolia School and Orange County Public Schools regarding upcoming construction events. As a result, we completed this project safely, as scheduled, and with the least impact on the Magnolia School students.

INNOVATIVE PROGRAMS RELATED TO PERSONNEL MANAGEMENT

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

This management approach created a professional and positive environment that relied on input from all parties involved in a project and effectively encouraged

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CASE STUDY

dialogue between team members to preemptively address any potential conflict that may have arisen under different conditions.

CPPI is recognized for its excellent job site management, primarily due to strong relationships built over a lengthy period of time with trade contractors



throughout the state. Management and coordination of all team members are vital elements of any successful project, but they can be absolutely critical when involving the complexities of multi-phased and active campus construction.

CPPI brings the latest technology directly to the project site and field staff. Our staff utilizes tablets in the field, allowing immediate communication regarding all facets of the project. They can access the entire schedule and the names and contact information of every subcontractor and supplier partner working on our project. This technology makes all project information accessible immediately and helps with portability, speed, and versatility.

INNOVATIVE PROGRAMS RELATED TO VALUE ANALYSIS

CPPI presented an on-budget estimate at each stage of the preconstruction process with a list of options for OCPS and the design team to consider, thereby always having an on-budget path for the project to proceed on. All stakeholders considered these options and made decisions as to which ones warranted serious consideration. At subsequent design deliverables, these selected options were detailed separately on the drawings so that they could be competitively priced as add-options by the subcontractor community.

CPPI offered an extensive list of Value Analysis items at the time of GMP submittal for the ESE Consolidation project. The owner selected several of these items without changing the function of the school. Our unyielding efforts to save the school district money allowed OCPS to meet its budget and proceed with the project.

SPECIAL OBSTACLES ENCOUNTERED

CPPI is well versed in the challenges that are present when working on an occupied campus. This project required a coordinated effort 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 understood the needs of The District. Below are several of the items we included in our site utilization plan. This plan became our road map for communication for all stakeholders involved in the construction process.

Standardized Testing - Our team had a plan in place to stop noisy construction work during weeks of standardized testing to allow for the full concentration of teachers and students.



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CASE STUDY



Communication - We communicated with the school staff daily concerning the departments that may be affected by the construction.

Signage/Wayfinding - Various methods were used to communicate clearly with all who passed the construction area assisting them with new pedestrian and vehicular traffic patterns as well as updates on the construction process.

Clean Site - We were mindful of keeping the site aesthetically pleasing during construction, necessary for the safety of all involved.
Noise and vibration can affect the building occupants. We coordinated with the campus schedule and were sensitive to the needs of the staff, students, and departments. We adjusted 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. We utilized the appropriate methods including physical barriers between the new construction and existing structure and water trucks for site dust control to consolidate the soil.

Construction Traffic - Our team created a Material Delivery traffic plan that did not impact the daily operation of the campus.

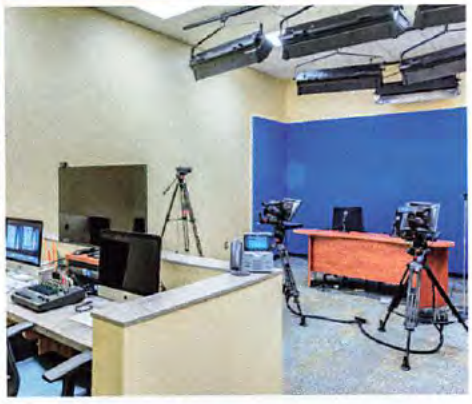
Site-Specific Staging Issues - Once the specific details of the project were available, our team addressed the scheduling needs of the school's class schedule calendar regarding utility tie-ins/shutdowns for the project. In addition, our team formulated a plan for storm water retention needs, material staging, as well as off-site construction parking.



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Orlando, FL

ORANGE COUNTY SCHOOLS

SALLY RIDE ELEMENTARY SCHOOL

K-12 EDUCATION

OCCUPIED CAMPUS

REPLACEMENT PROJECT

SIZE

TIGHT SITE

SCOPE

This project consisted of the replacement of existing buildings and construction of 43,640 SF of new buildings to accommodate 500 student stations as well as 20,164 SF of renovations. This project's final layout included classrooms, skills/resource labs, administration, art/music, kitchen, dining/multi-purpose room, support spaces and a media center.

[redacted]

KEY PERSONNEL INVOLVED



4.0.1.5. PREVIOUS EXPERIENCE

c. 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.









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Savannah, GA

SAVANNAH CHATHAM COUNTY PUBLIC SCHOOL SYSTEM

HARRIS EDWARDS DAVIS EDUCATIONAL COMPLEX (FKA GROVES 6-12)

K-12 EDUCATION

BUDGET

REGIONAL PROJECT

SIZE

TIGHT SITE

SCOPE

This new, state-of-the-art facility is close to 400,000 square feet and has a capacity of 2,400 students. Students from Gould Elementary School, Mercer Middle School, and Groves High School are now housed on a single, large campus. The campus includes a digital media lab, CTAE labs for aviation and logistics as well as business and family consumer sciences. The campus also features a two-story, 750-seat auditorium with a full-scale performance production stage. There are three new paved parking lots with a capacity of more than 660 parking spaces. A new traffic signal was added to the entrance and exit of the campus on GA Highway 21 to improve the safety of traffic flow.

[redacted]

KEY PERSONNEL INVOLVED



4.0.1.5. PREVIOUS EXPERIENCE

c. 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.





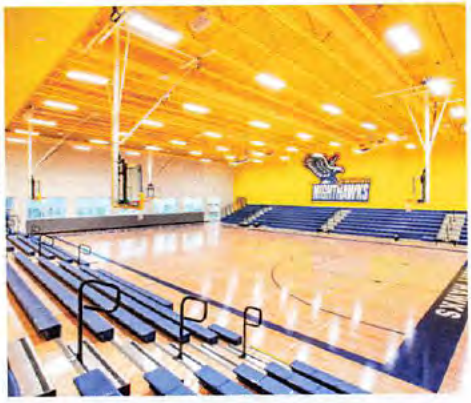




c. Provide descriptions of five renovation projects most comparable to the proposed project scope in which your firm has been involved over the last five years (at least two must be completed). Include the services provided, the Project Team members, schedules, and references.







Savannah, GA

SAVANNAH CHATHAM COUNTY PUBLIC SCHOOL SYSTEM

NEW HAMPSTEAD K-8 SCHOOL

K-12 EDUCATION

BUDGET

REGIONAL PROJECT

SIZE

TIGHT SITE

SCOPE

This project included the construction of three buildings, site improvements, and a connector road to New Hampstead High School, located on the same property. The New Hampstead K-8 School has 92 new classrooms and accommodates 1,500 students. The new school alleviates overcrowding from nearby Pooler, which currently has at least one school over capacity, and Georgetown, which is also growing. Additional features of the school include a cafeteria, library, gymnasium and music rooms. Exterior project components include three playgrounds, raised garden beds in the courtyard for gardening curriculum, and ground-mounted solar panels. The school's parking lot has 199 spaces.

[redacted]

KEY PERSONNEL INVOLVED



4.0.1.5. PREVIOUS EXPERIENCE

c. 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.









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Jacksonville, FL

DUVAL COUNTY PUBLIC SCHOOLS

HIGHLANDS ESTATES ACADEMY ELEMENTARY SCHOOL

K-12 EDUCATION

BUDGET

REGIONAL PROJECT

SIZE

TIGHT SITE

SCOPE

This project consists of the construction of a new prototype elementary school for Duval County Public Schools. The scope of the project includes the demolition of the existing school, construction of a replacement facility, and site improvements. This project consolidates the current Highlands and Pine Estates Elementary Schools and will provide 750 student stations. Spaces will include ESE classrooms, an art lab, a music room, and a skills lab.

[redacted]

KEY PERSONNEL INVOLVED



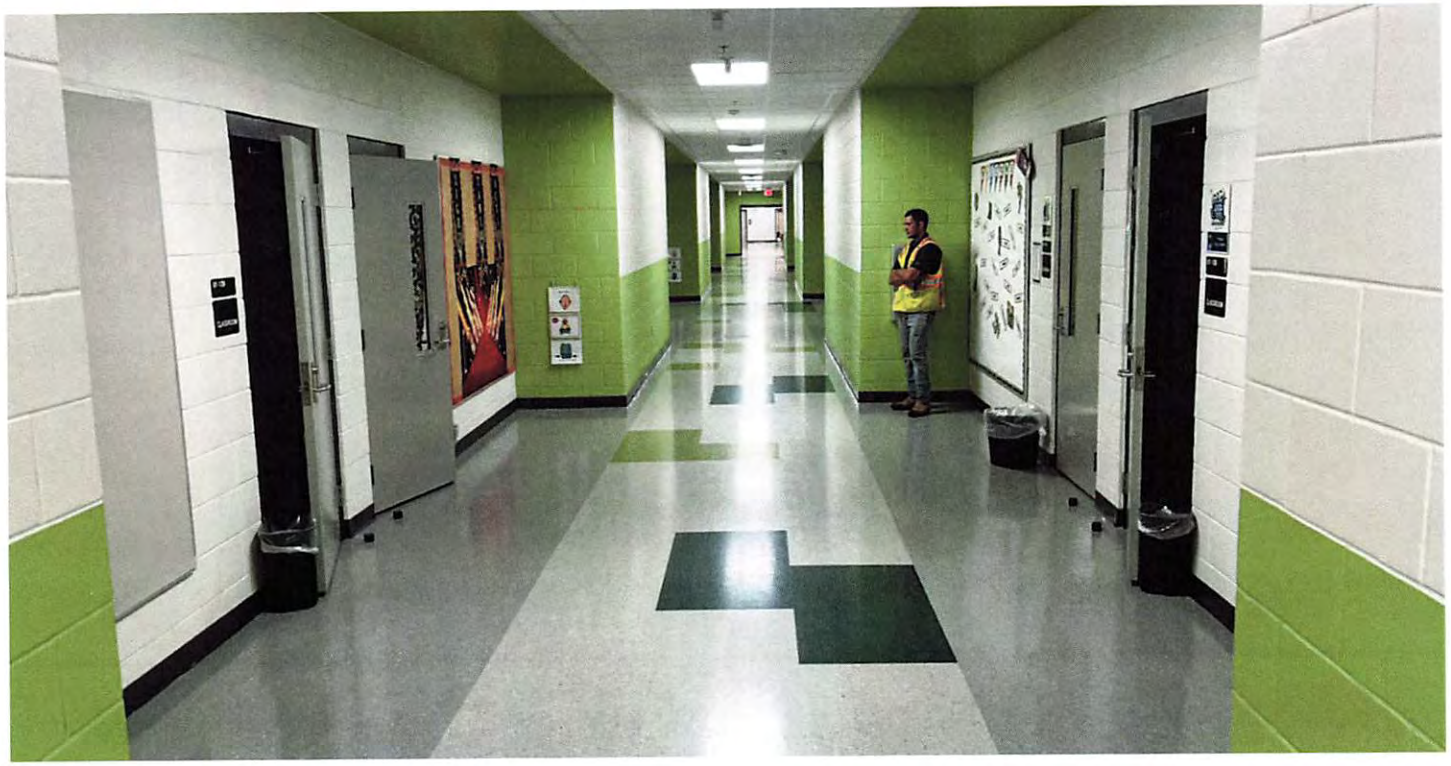
4.0.1.5. PREVIOUS EXPERIENCE

c. 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.









• 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.

Annual Volume Of Construction Contracts

2023: $327,403,186
2022: $237,858,637
2021: $251,263,148
2020: $245,641,633
2019: $244,000,000

Savannah Office:
2023: $63,743,852
2022: $50,109,967
2021: $51,823,948
2020: $21,074,299
2019: $5,161,157

• What is the current dollar value of work under Contract?

Current Dollar Value Of Work Under Contract

$400,000,000+

• What is the typical dollar range of projects under Contract with your firm?

Typical Dollar Range Of Projects Under Contract

CPPI's typical dollar range for major projects is $4,000,000 - $150,000,000. Additionally, CPPI has a division specifically dedicated to projects under $4,000,000.

• Identify what percentage of your work is hard bid and what percentage is based on a CM/GC at Risk or similar approach?

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

CPPI's work is comprised of 80% CM, GC and Design-Build contracts, with the remaining 20% consisting of hard bid or negotiated GMP work.

• Identify what percentage of your work is hard bid and what percentage is based on a CM/GC at Risk or similar approach?

Percentage Of Renovation Work Vs. New Construction

CPPI's work generally consists of approximately 70% new construction, with the remaining 30% consisting of renovation projects.



RIVER SPRINGS MIDDLE SCHOOL



EAST RIDGE MIDDLE SCHOOL

• Submit your most recent financial statements (at a minimum, balance sheets and income statements for 2022 and 2023) and verification of current bonding capacity.

Financial Statements & Bonding Capacity

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

• Provide two bank references.

[redacted]

[redacted]





CPPI agrees to comply with the following requirements listed in section 4.0.1.9. of the RFP:

☑	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.

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

Information Management

During our project kick-off, we introduce our plan for record keeping, reporting, and information management. With input from all parties involved we will tailor our systems to provide information in the manner most efficient to BCSD and your project management team.

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 include:

- ☑ Basic administration and project data
- ☑ Project specific procedures
- ☑ Request for Information (RFI) log and all corresponding communication/backup
- ☑ Submittals
- ☑ Quality control/assurance
- ☑ Monthly reports and OAC meeting minutes
- ☑ Document control
- ☑ Contract administration
- ☑ Cash flow summary (detailed in financial management)

All the reports and information above is interactive and transparent, when updates are made or items added the team will have access.

Monitoring Systems

CPPI monitors projects at several different levels and utilizes Autodesk Build to track and report amongst the team.

Internal Monitoring - our project directors and regional vice presidents ensure that each project is performing at the highest level, this includes team and project performance as well as client satisfaction. Additionally, our superintendents are required to maintain a log for daily reports and running punch list throughout the project. This acts as our tool for a swift and complete close-out and ensures subcontractors are performing all commitments to CPPI standards.

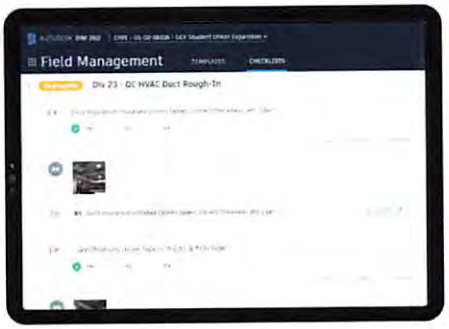
External Monitoring - we consider to be meetings that take place on a reoccurring basis with our complete project teams. These meetings include subcontractor face-to-face and OAC meetings.

Subcontractors - our teams meet with the subcontractors during bidding to review scopes of work, contracts, and establish commitments. Once construction begins we conduct "pre-work" meetings to cover project specific plans, safety, logistics and our expectations on-site. During construction our superintendent will hold weekly subcontractor meetings to review schedule, manpower and any outstanding items.

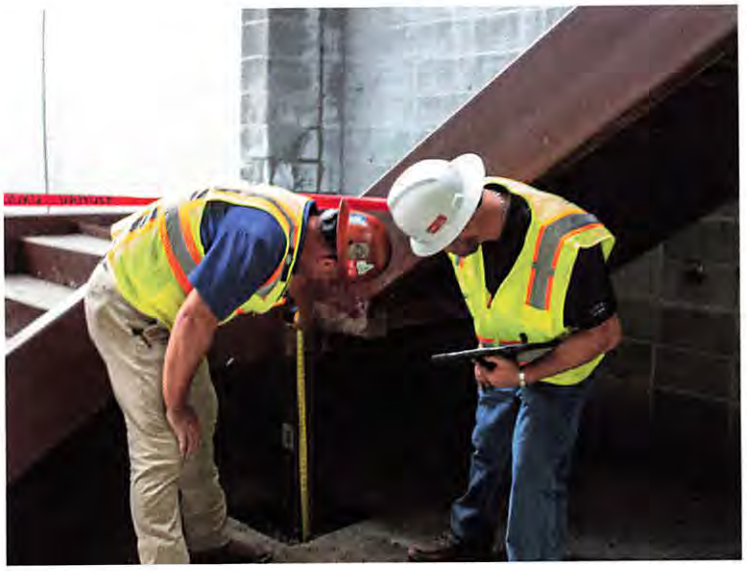
Owner, Architect, and Contractor (OAC) Meetings - these meetings include the project's management entities, owner, architect and contractor. These meetings typically occur weekly and the purpose is to provide the owner's team with a status update, project 2-week look ahead and clarifications to any outstanding items. All information from these meetings is captured and distributed to the team via Autodesk Build.

Technology in the Field

Our staff utilizes tablets in the field which allows for immediate communication regarding all facets of the project, using Autodesk Field. Users in the field can access, edit, and send information instantaneously. Autodesk Field not only provides a seamless vehicle for file exchange and paperless collaboration, but also helps project stakeholders to reduce environmental impacts and maximize economic and environmental performance.



With the click of a button, you have complete access to project documents and on-site communication through the use of Autodesk Field. This paperless system ensures sustainable adherence and quick communication for efficient decision-making.



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

Project Close-out and Warranty

Close-out is an often neglected area of construction that can turn an otherwise high quality project into a mediocre one. Project close-out begins immediately upon mobilization onto the site when the Superintendent establishes a set of as-built drawings and fully commits to update them on a regular basis. We also require all subcontractors to complete daily updates to the as-built drawings and provide in-depth pictorial review of the construction progress ensuring a clear understanding of the in-wall and above-ceiling components.

CPPI's team will maintain a high level of quality workmanship throughout the duration of the project, minimizing the amount of corrective work required at the end of the project.

At the completion of the project we will:

- ☑ Submit all the required operating and maintenance manuals, warranties and attic stock in an organized fashion.
- ☑ Bind all documentation for easy reference and include necessary contact info for warranty related service.
- ☑ If applicable, ensure your move space is as seamless and efficient as possible.
- ☑ Conduct post occupancy reviews with the design team, subcontractors, owners, and end users to ensure all systems work as they should and that the user group and owners are completely satisfied.
- ☑ Handle all warranty issues, so in the unlikely event of a problem, you only have to call CPPI to have the issue remedied. We provide a single point of contact for warranty related issues.
- ☑ Cash flow summary (detailed in financial management).



CPPI handles all warranty items so BCSD needs to make only one call in the unlikely event of a problem. The CPPI team proactively schedules seven and eleven month walk-throughs are conducted to ensure BCSD gets maximum benefit from the warranty period.

Transition Planning

Upon final completion of the project, our crew also provides the following transitional services:

- ☑ Determination of the final completion of project.
- ☑ Preparation of a complete operations/maintenance manual for owner and end user.
- ☑ Securement and forwarding of all guarantees, affidavits, releases, bonds, and waivers.
- ☑ Turn over of all as-builts and records to owner.

Owner & Personnel Training

Our team conducts owner training on all building and site systems that require periodical maintenance and adjustments.

- ☑ On-site training sessions performed for the actual system the end user will be operating.
- ☑ CPPI conducts the training utilizing preset agendas corresponding with the manufacturer's recommendations.
- ☑ Recording each session and include in the closeout documentation.
- ☑ Training sessions conducted in an open manner with personnel interaction with the technicians and maintenance.

• 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 jobsite 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.

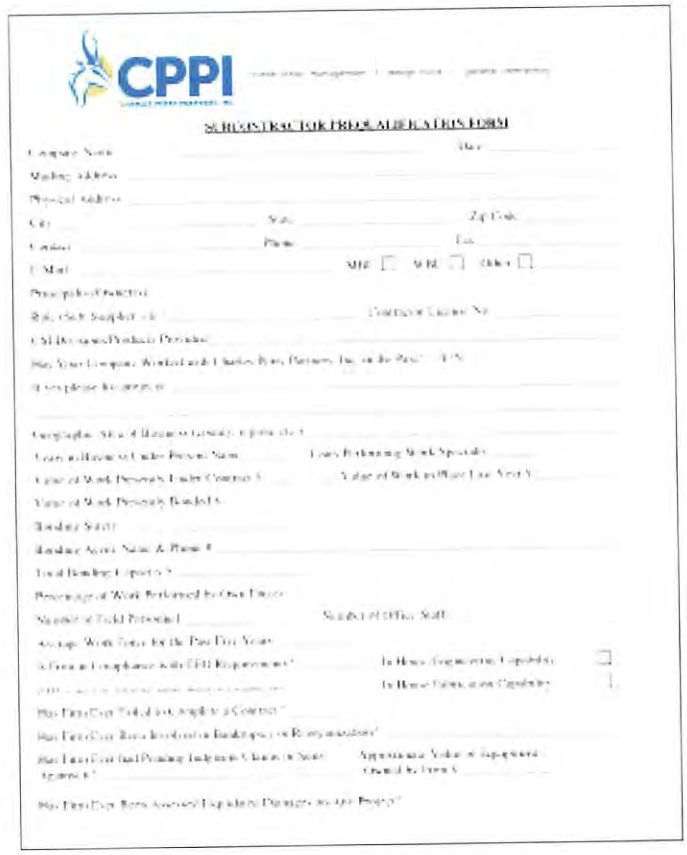
- Our management team supports and respects all trade contractors, and strives to quickly and fairly resolve any minor issues before they become major concerns. This open channel of thorough communication, coordination and involvement is instilled and encouraged in all of our team members.

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.

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.




CPPI

SUBCONTRACTOR PREQUALIFICATION FORM

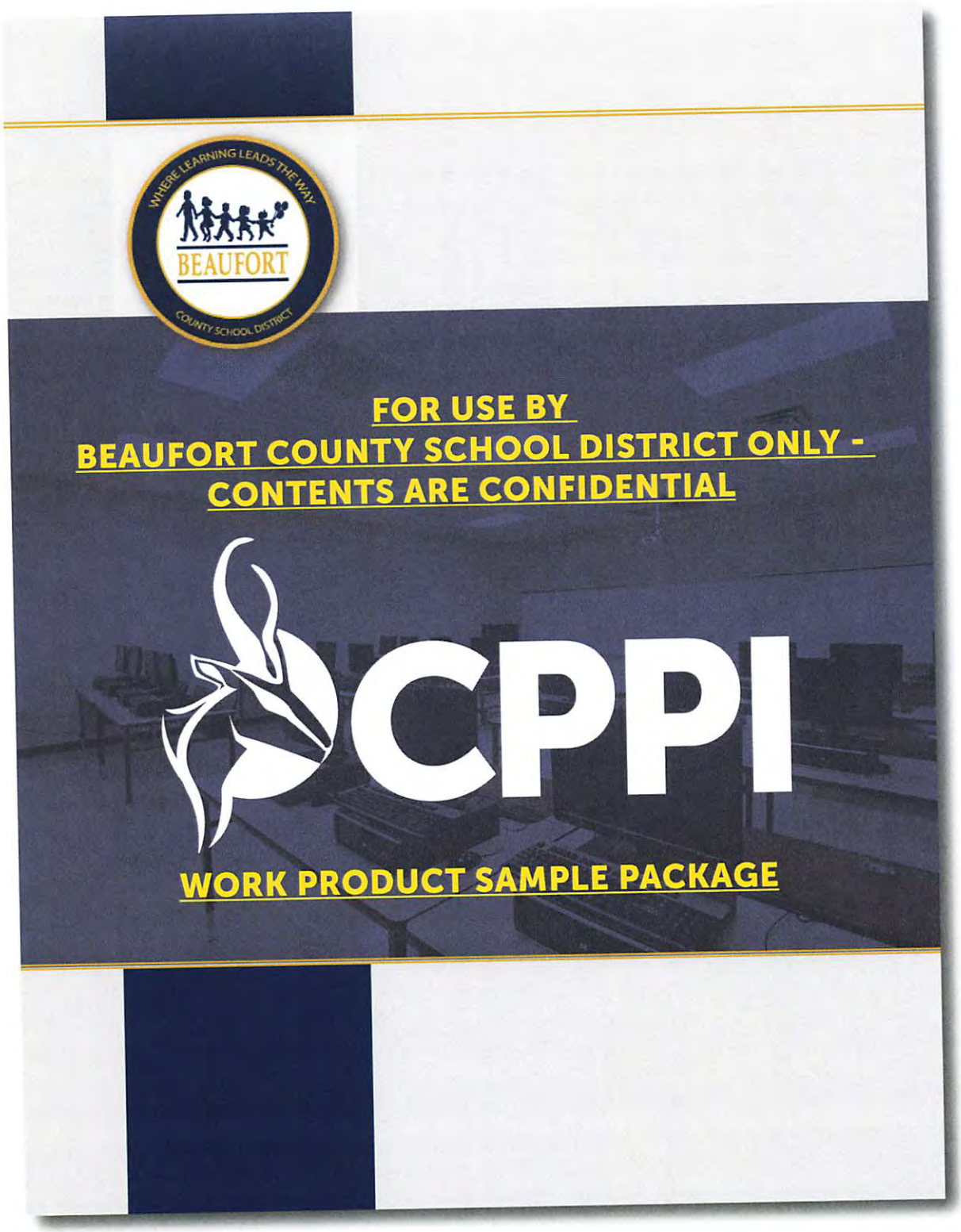
4.0.1.9. MISCELLANEOUS

• 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 ensure 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 subcontractor 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.

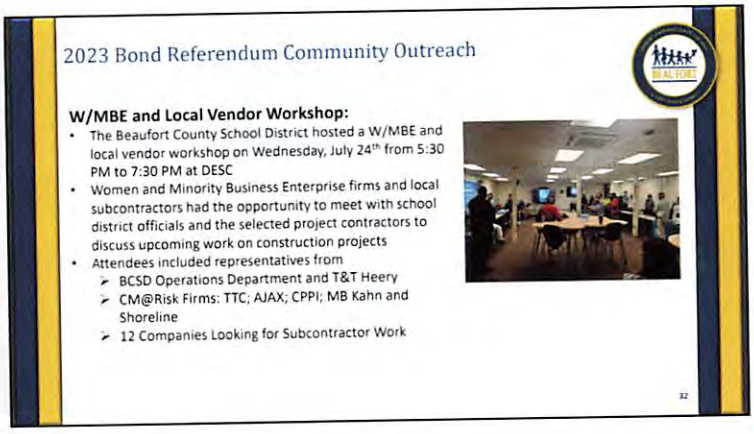
MENTORSHIP PROGRAM

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.

We were proud to represent the District at your recent W/MBE and Local Vendor Workshop in July. We understand the importance of local vendor involvement in these two projects:

- Promotes competition.
- Lowers the costs of the work.
- Employs the local workforce.
- Instills community pride.
- Regenerates the tax base.
- Keeps your expenditures in Beaufort County.

WE ARE COMMITTED TO YOUR GOALS!


2023 Bond Referendum Community Outreach

W/MBE and Local Vendor Workshop:

- The Beaufort County School District hosted a W/MBE and local vendor workshop on Wednesday, July 24th from 5:30 PM to 7:30 PM at DESC
- Women and Minority Business Enterprise firms and local subcontractors had the opportunity to meet with school district officials and the selected project contractors to discuss upcoming work on construction projects
- Attendees included representatives from
  - BCSD Operations Department and T&T Heery
  - CM@Risk Firms: TTC; AJAX; CPPI; MB Kahn and Shoreline
  - 12 Companies Looking for Subcontractor Work

• 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 subcontractor 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.

WE KNOW HOW TO BUILD SCHOOLS!

In order to establish a forecasted schedule and a forecasted budget, all stakeholders must get together and on the same page as soon as possible. The CPPI team encourages an atmosphere of communication by creating a teaming environment from the earliest stages of the project. This proactive approach has been critical to the success of our team relationships on every project.





PROJECT SCHEDULE ADHERENCE

For your projects, the schedule will be highly detailed, covering every aspect of the work from programming to punch list completion. It will encompass all related project management, design, procurement, construction, and occupancy activities. The master schedule guides all activity and serves as the central schedule, from which several other tools are produced to ensure a smooth delivery.

CONSTRUCTION SCHEDULE

This construction schedule focuses on the period from groundbreaking to punch list completion. It outlines and provides the means for managing and monitoring all subcontractor site activities. Similar to the master project schedule, it outlines in greater detail the work activities of the on-site construction. This schedule is used to plan every task related to the actual construction necessary for the timely delivery of the project. We incorporate Lean scheduling practices in order to maximize subcontractor effectiveness and reduce costly mobilizations. We utilize the best aspects of Lean scheduling to allow multiple subcontractor teams to work concurrently in different sections of the site, thereby ensuring the efficient use of the workforce.

LOOK AHEAD SCHEDULE

The two-week look ahead schedule is used to plan and coordinate all subcontractor activities on a detailed basis over a near-term, short period of time. This valuable tool brings focus to specific portions of the overall project. This schedule is prepared and continuously updated by the project superintendent. For instance, a two-week look ahead schedule would be used to focus on critical path activities. It may also be used to help trade contractors gain production and make up time. This near-term schedule is also employed to rearrange work to address the ever-changing dynamics of the actual field conditions. This schedule tool defines the technical scope of each activity to its lowest task level, which makes tasks easily manageable. Our five decades of experience has enabled CPPI to develop relationships with a large network of subcontractors. Developing and maintaining these relationships is vital to the long-term working success of the team, and we use subcontractors who have proven to be reliable and perform high quality work.



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

PROJECT UNDERSTANDING

We attended your community awareness meeting earlier this month for Lady's Island Middle School. We saw firsthand:

- The District's mission to openly communicate with its citizens.
- Dedicated professionals working hard on a unique project.
- The passion of Quackenbush Architects to design a state-of-the-art replacement school.
- Community pride in their local schools.
- The importance placed on an excellent education in Beaufort County.



WE ARE COMMITTED TO YOUR GOALS!







SITE LOGISTICS

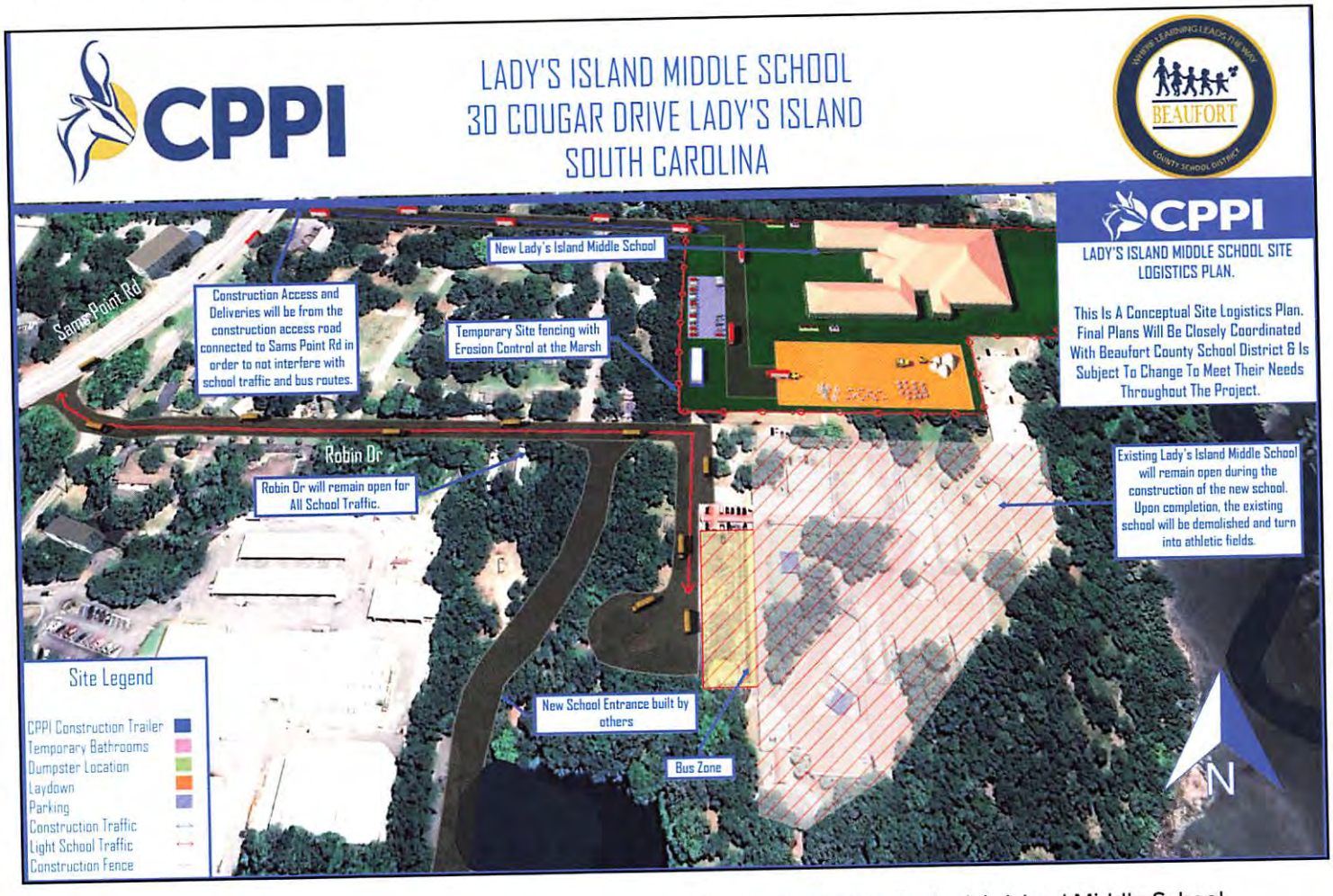
We have prepared preliminary site logistics plan with our initial thoughts for our approach to your projects. Please see the following pages.



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

PROJECT UNDERSTANDING

Lady's Island Middle School (1 of 2)



This plan outlines the preconstruction mobilization strategy to effectively execute the Lady's Island Middle School replacement project. Given the active campus environment and the need for multiple phases, this plan is designed to prioritize safety, coordination with the school district, and a seamless transition from preconstruction to construction.

MOBILIZATION PLAN

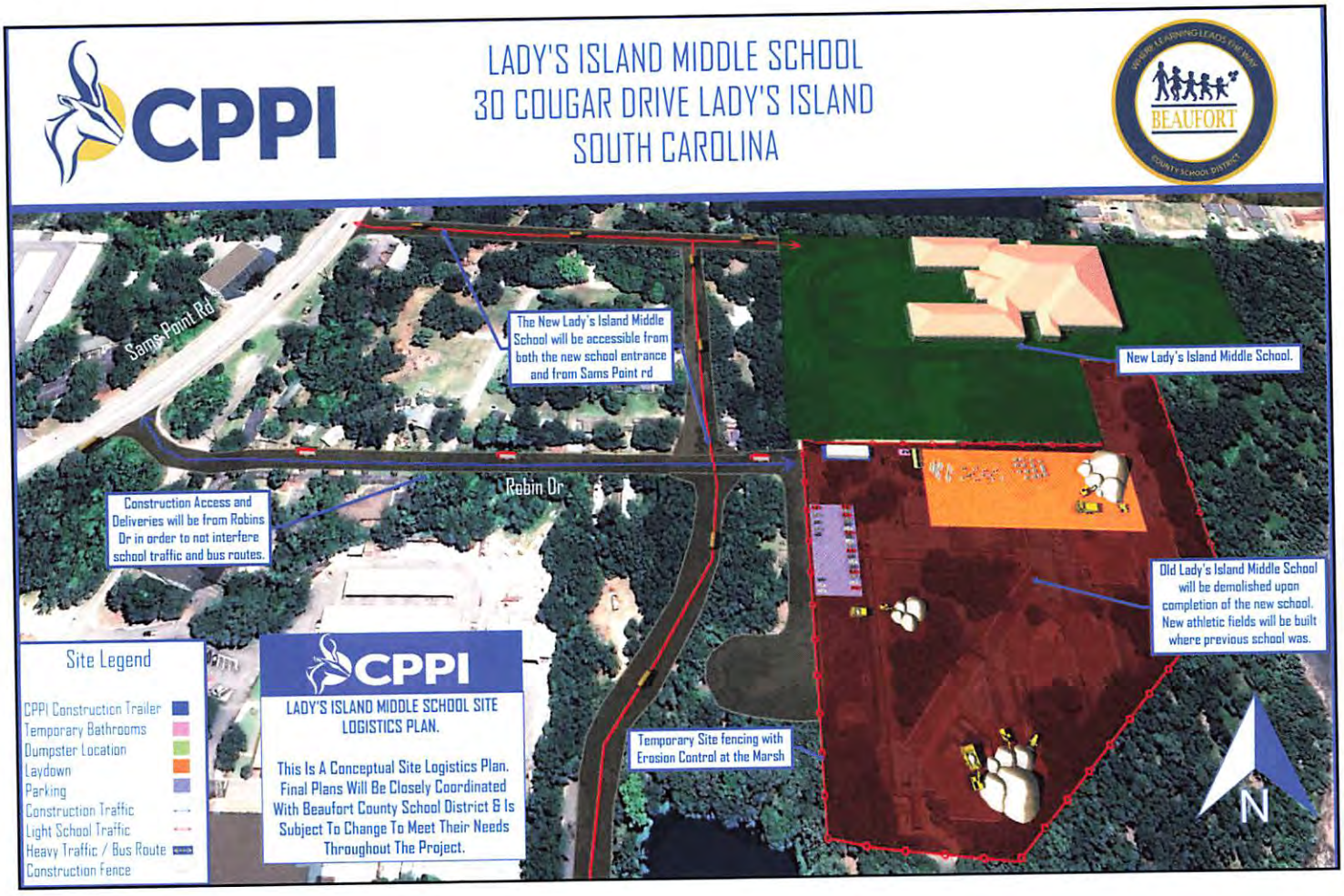
- **Comprehensive Site Assessment:** Conduct a thorough site assessment to identify access points, utilities, existing structures, and potential constraints. Develop a detailed site layout plan, taking into account the ongoing school operations.
- **Phasing Plan Development:** Create a detailed phasing plan that outlines the sequence of construction activities, considering the school's academic calendar and the need to minimize disruptions.
- **Safety and Emergency Planning:** Develop robust safety and emergency plans, including evacuation procedures, site security measures, and compliance with all relevant regulations.
- **Coordination with School District:** Establish a strong working relationship with the school district, involving them in the planning process and ensuring open communication channels.
- **Temporary Infrastructure:** Plan for temporary infrastructure, including fencing, security, office trailers, and utilities, while minimizing disruptions to the school's daily operations.
- **Equipment and Material Procurement:** Create a comprehensive list of necessary equipment and materials, ensuring timely procurement and delivery to the site, considering the phased approach.
- **Traffic Management:** Develop a traffic management plan to address increased vehicle traffic during construction, ensuring the safety of students, staff, and the public.

(continued on following page)

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

PROJECT UNDERSTANDING

Lady's Island Middle School (2 of 2)



MOBILIZATION PLAN (CONTINUED)

- **Environmental Compliance:** Implement measures to comply with environmental regulations, including minimizing noise and dust pollution, and managing waste appropriately.
- **Communication and Community Engagement:** Establish a communication plan to keep the school district, students, staff, and the community informed about the project's progress and any potential disruptions.
- **Pre-Construction Meetings:** Conduct regular pre-construction meetings with all stakeholders to review plans, address issues, and ensure alignment on project objectives.
- **Communication and Community Engagement:** Establish a communication plan to keep the school district, students, staff, and the community informed about the project's progress and any potential disruptions.
- **Pre-Construction Meetings:** Conduct regular pre-construction meetings with all stakeholders to review plans, address issues, and ensure alignment on project objectives.
- **Emergency Response Plan:** Develop a detailed emergency response plan to address potential incidents, such as accidents or natural disasters, ensuring a swift and effective response.

This preconstruction mobilization plan provides a structured approach to initiate the start of this project effectively. Following these steps can minimize delays, optimize resource allocation, and ensure a successful transition from preconstruction to construction phases.

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

Early Childhood Center



This plan outlines our preconstruction mobilization strategy to execute the Early Childhood Center project in Bluffton effectively. Establishing a well-organized and efficient mobilization process will ensure a smooth transition from preconstruction to construction phases.

MOBILIZATION PLAN

- **Site Assessment and Planning:** Conduct a thorough site assessment to identify access points, utilities, and potential constraints. Develop a site layout plan and mobilization schedule.
- **Equipment and Material Procurement:** Create a comprehensive list of necessary equipment and materials, ensuring timely procurement and delivery to the site.
- **Temporary Infrastructure:** Plan for temporary infrastructure, such as fencing, security, office trailers, and utilities, to support construction activities.
- **Safety and Environmental Protocols:** Establish robust safety and environmental protocols, including emergency response plans and compliance with local regulations.
- **Subcontractor Coordination:** Coordinate with subcontractors, ensuring their mobilization plans align with the overall project schedule and site requirements.
- **Permitting and Approvals:** Obtain necessary permits and approvals from local authorities, including building permits, zoning clearances, and environmental permits.
- **Community Outreach:** Engage with the local community, addressing any concerns and providing updates on the project's progress.
- **Pre-Construction Meetings:** Conduct regular pre-construction meetings to review plans, address issues, and ensure everyone is aligned on the project objectives.

This preconstruction mobilization plan provides a structured approach to initiate the start of this project effectively. Following these steps can minimize delays, optimize resource allocation, and ensure a successful transition from preconstruction to construction phases.

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

COST/BENEFIT ANALYSIS

Our team will analyze each building system to find ways to improve the efficiency and value of the building. Working with the design professionals, we will explore significant building systems based on operating costs over time. This effort will entail various scenarios related to mechanical, electrical, plumbing, and fire protection systems. These systems will be reviewed for efficiency, performance, maintenance cost, and repairs over the life of the individual system. Energy usage is paramount in the life cycle cost evaluation. In addition to MEPF systems, we will also evaluate exterior skin, roofing, and interior finishes.

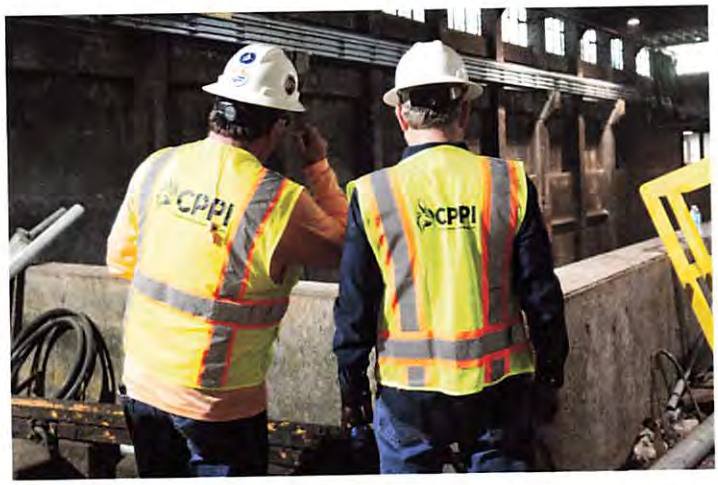
When we discuss value engineering, we focus not strictly on the up-front cost savings but on the life cycle costs and trade-offs associated with the change. Value engineering should include the building›s life span and not only the initial construction costs. We continuously monitor the market to stay updated on any changes or trends regarding commodity material pricing, labor pressures, and subcontractor activity. This allows us to predict pricing escalation and cost pressures. We use this information as part of our Cost/Benefit Analysis to create the most cost-effective design possible.

CPPI's K-12 project delivery philosophy revolves around the relationship of our project team members. The owner (owner›s representative), BCSD, design team, and CPPI must work as an integrated team of professionals providing mutual support.

Design, cost, and schedule concerns must be constantly managed as each decision is made through the project delivery process. These concerns must be addressed proactively, enhancing problem avoidance rather than simply problem-solving. CPPI believes quality does not happen by accident. It begins with an experienced, committed project team and continues with establishing specific quality goals and monitoring the total delivery process through project management. Our program is proactive, with thorough planning and scheduling throughout the process. The team we are proposing is committed to being involved in every aspect of design and construction related to this project.

During the design phase, the key to assuring plans and specifications are fully complied with is to begin the management process from day one. CPPI will initiate a system in which we communicate directly with the architect and their consultant team to ensure that project documents are developed clearly and in a manner that eliminates confusion or misinterpretations.

Our goal is to find the best way to produce the desired results. During construction, the focus shifts to the actual management of the work. Our approach is error avoidance. You get what you inspect - not what you expect. The long-term importance of quality must not be sacrificed for the short-term needs of the budget and schedule constraints. CPPI implements a project management program to ensure that owner expectations are met.





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

CPPI combines our company resources with our construction expertise to manage the performance and delivery of a project. This culmination is detailed record-keeping and reporting systems that keep the team and the owner informed. Our project management procedures are implemented and maintained so the team knows what is happening, what happens next, and who is responsible. Clear and precise records and documentation are maintained throughout the progress.



CPPI promotes an open book approach to project management. All our reports, analyses, databases, etc., are available for the team to share and question. A thorough understanding of all concerns and the process used to make recommendations enable the team to achieve the project's goals. Our services begin at the project's planning phase, and CPPI will work closely with BCSD and the selected design team through commissioning and post occupancy services.

TEAMWORK AND COMMUNICATION

CPPI does not think like most teams. We understand cost, schedule, and quality are critical; however, there areseveral key areas that we focus on from the very beginning before getting started with the project. These are building a high-performance team, having open and honest collaboration, comprehensive values alignment, and the right behaviors. The project team will explore innovative solutions while considering practical aspects such as budget, constructability, and sustainability.

INTEGRATING MULTIPLE STAKEHOLDERS

Understanding, coordinating, and executing the needs of all involved parties to provide a safe and satisfactory outcome that meets all parties needs and goals is a significant challenge. This project includes not only the owner, and design team, but also several end-user groups within the community the local building department, and local regulatory agencies. Finding common ground and establishing open lines of communication from day one will be our priority for success.

Our team proposes to leverage our Kick-off Frameworks Program as a starting point for team alignment this project. During kick-off, a decision matrix will be defined, expectations will be clearly communicated, and all specific stakeholder needs for each phase of the project will be identified. Having these items identified early and clearly will allow our team to effectively manage communications between all parties and avoid any surprises during or at completion of the design and construction phases of the project.

Collaborative teams don't just happen, they are built. The entire team has to "buy in" to being partners practicing a transparent process of information sharing of schedule and cost management, and ultimately successful project delivery. Our goal in building successful project teams is to develop a clear understanding of each other's strengths, diverse points of view, perspectives and work styles, and create a high performance team that is both technically and socially integrated.

The Kick-off Frameworks Program standardizes the process on your projects and gives our team the "framework" from which to build. This results in a custom project strategy uniquely suited to your values and the specific needs of the school and its stakeholders.



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



With this process, we accomplish two things:

- Ensure that what is valuable to you, the owner, is deeply understood and that everything we do directly addresses your value proposition and the betterment of the team.
- Enable team alignment, transparency, and much greater integration to avoid issues that create rework and better leverage the collective expertise of all project stakeholders.

Coordination with BCSD's Project Manager

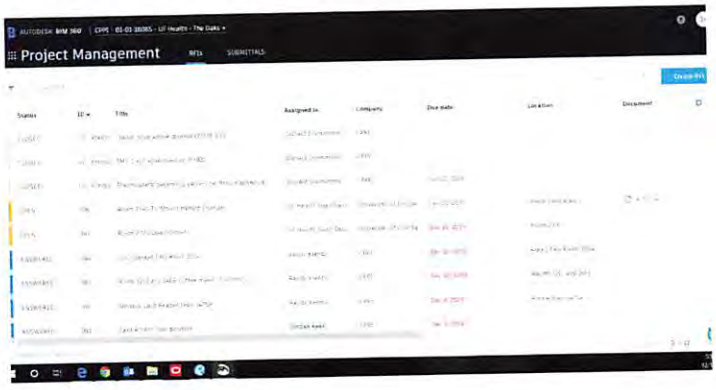
Our team will utilize a single point of contact during each phase of the project, design and construction. This will ensure effective communication and collaboration with the school's Project Manager.

This will include all levels and details of the project's design, bidding and construction. The CPPI team will take ownership of the project and all communication will go through us to not burden your team with tasks we can handle internally. Your project manager will be included in all design coordination meetings and Owner/ Architect/ Contractor Meeting (OAC) meetings during construction.



Transparent Communication at All Levels

CPPI recognizes clear communication and the ability to access information is key to a successful project completion. We will use Autodesk Build and other integrated project management tools, all of which can be shared with the entire team. Providing all stakeholders with access to our management systems is part of our open book approach and keeps all levels of project management informed. CPPI utilizes current construction software and technology that allows our personnel to manage information, communicate, control documents and perform trade contractor management efficiently and collaboratively. Industry specific software utilized by our entire project team includes:



Autodesk Build: This construction management software system provides live access to all project team members for fluid communication and immediate transfer of critical information. Examples of the information include drawing changes, Request for Information (RFI) questions and responses, submittals, and daily reports, as well as other logs. The platform is on-line, flexible and managed by our team.

Bluebeam: This is used to electronically manage and share drawings. Bluebeam also offers capabilities to share project-related documents such as photos and schedules to facilitate collaborative review.

Primavera: This is used for creation and management of our project schedules.

Building Connected: Our estimating software to develop and manage bid lists and solicit bids.

Sage: This is our industry-focused accounting software. Sage allows our teams to monitor project costs at real time, from job costs, change orders, and invoices.

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

August 29, 2024

Date

Name: **Jason Morgan**

Title: **Executive Vice President / Principal**

Project: **RFP #25-004 Construction Management At-Risk Services - Lady's Island Middle School - Replacement on Active Campus and Early Childhood Center in Bluffton - New Build**