

BOARD OF COUNTY COMMISSIONERS WARREN COUNTY, OHIO

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TOM ARISS PAT ARNOLD SOUTH DAVID G. YOUNG

BOARD OF COUNTY COMMISSIONERS WARREN COUNTY, OHIO

MINUTES: Regular Session - May 21, 2013

The Board met in regular session pursuant to adjournment of the May 14, 2013, meeting.

Tom Ariss - present

David G. Young - present

Pat Arnold South - absent

Tina Osborne, Clerk - present

Minutes of the May 14, 2013 meeting were read and approved.

13-0730	A resolution was adopted to accept Resignation due to Retirement, for Carl Gatton, Operations Superintendent, within the Water and Sewer Department, effective August 2, 2013. Vote: Unanimous
13-0731	A resolution was adopted to Amend Resolution #13-0638 approving the hiring of Temporary Employees for the Water and Sewer Department. Vote: Unanimous
13-0732	A resolution was adopted to Rescind Resolution #13-0687 which authorized the hiring of Mark J. Landers, for the Co-Op Position of Environmental Technician, within the Warren County Water and Sewer Department. Vote: Unanimous
13-0733	A resolution was adopted to enter into a Resignation Agreement with Casey Lukemire, Data Technician within the Warren County Telecommunications Department. Vote: Unanimous
13-0734	A resolution was adopted to declare an Emergency and Waive Competitive Bidding Process for Emergency repair of Elevator at 406 Justice Drive Lebanon Ohio. Vote: Unanimous

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13-0735	A resolution was adopted to accept changes to the Section 125 Cafeteria Plan Document Relative to Changes to Flexible Spending Accounts (FSA's). Vote: Unanimous
13-0736	A resolution was adopted to approve the Contract for School Resource Deputy with the Kings Local School District, on behalf of the Warren County Sheriff's Office. Vote: Unanimous
13-0737	A resolution was adopted to approve and enter into an Agreement with Adam Paine on behalf of the Warren County Juvenile Court for a Summer School Teacher for Mary Haven Youth Center. Vote: Unanimous
13-0738	A resolution was adopted to approve and enter into an Agreement with Lance Runion on behalf of the Warren County Juvenile Court for a Summer School Teacher for Mary Haven Youth Center. Vote: Unanimous
13-0739	A resolution was adopted to approve Maintenance Contract Renewal Agreement with Motorola on behalf of Warren County Telecommunications. Vote: Unanimous
13-0740	A resolution was adopted to Advertise for Bids for Communications Cable Relocation Project. Vote: Unanimous
13-0741	A resolution was adopted to approve various Refunds. Vote: Unanimous
13-0742	A resolution was adopted to affirm "Then and Now" requests pursuant to Ohio Revised Code 5705.41(D) (1). Vote: Unanimous
13-0743	A resolution was adopted to acknowledge payment of Bills. Vote: Unanimous
13-0744	A resolution was adopted to approve and enter into an Electronic Monitoring- Equipment Rental and Monitoring Services Agreement with Emerge, Inc. on behalf of Warren County Common Pleas Court, Community Corrections Division. Vote: Unanimous
13-0745	A resolution was adopted to approve and authorize the President of the Board to enter into a Youth Worksite Agreement on behalf of Workforce One of Warren County. Vote: Unanimous
13-0746	A resolution was adopted to approve Appropriation Decreases within various Funds. Vote: Unanimous
13-0747	A resolution was adopted to approve Cash Advance from the General Fund #101 into Domestic Preparedness Grant Fund #260. Vote: Unanimous

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13-0748	A resolution was adopted to accept an Amended Certificate and approve a Supplemental Appropriation within Engineer's Office Fund #485. Vote: Unanimous
13-0749	A resolution was adopted to accept Amended Certificate for Sheriff's Office Fund #630 and approve Supplemental Appropriations into Sheriff's Office Fund #630. Vote: Unanimous
13-0750	A resolution was adopted to approve Supplemental Appropriation into the Auditors Real Estate Fund 237 to allow for 2012 New Construction Valuations in 2013. Vote: Unanimous
13-0751	A resolution was adopted to approve Supplemental Appropriation within Fund #494. Vote: Unanimous
13-0752	A resolution was adopted to approve Appropriation Adjustment from Commissioners General Fund #101-1110 into Prosecutor's Fund #101-1150. Vote: Unanimous
13-0753	A resolution was adopted to approve Appropriation Adjustments within Prosecutor's Office Fund #271. Vote: Unanimous
13-0754	A resolution was adopted to approve Appropriation Adjustment within Sheriff's Office Fund #101-2200. Vote: Unanimous
13-0755	A resolution was adopted to approve Appropriation Adjustments within Juvenile Detention Fund #101-2600 and Felony Delinquent Care & Custody Fund #247. Vote: Unanimous
13-0756	A resolution was adopted to approve an Appropriation Adjustment within the Solid Waste Management District Fund No. 256. Vote: Unanimous
13-0757	A resolution was adopted to approve an Appropriation Adjustment within Common Pleas Court Fund #289. Vote: Unanimous
13-0758	A resolution was adopted to approve Appropriation Adjustment within Facilities Management Fund #101-1600. Vote: Unanimous
13-0759	A resolution was adopted to approve Appropriation Adjustment within Health Insurance Fund #632. Vote: Unanimous
13-0760	A resolution was adopted to approve Appropriation Adjustments within County Court Funds #101-1280 and #274. Vote: Unanimous
13-0761	A resolution was adopted to authorize payment of Bills. Vote: Unanimous

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13-0762	A resolution was adopted to accept #11,945.65 as payment from Melinda Bain Betley for First Time Home Buyer Loan. Vote: Unanimous
13-0763	A resolution was adopted to approve the Award of Preliminary Agreement for the Warren County Justice Drive Office Building Design-Build Project and Authorize the President of the Board to sign relative documents. Vote: Unanimous
13-0764	A resolution was adopted to hire David A. Shiverdecker to assist the Data Division within the Telecommunications Department, Full-time, Temporary. Vote: Unanimous
13-0765	A resolution was adopted to approve hiring Temporary Employee for the Water and Sewer Department. Vote: Unanimous

DISCUSSIONS

On motion, upon unanimous call of the roll, the Board accepted and approved the consent agenda.

On motion, bids were closed at 9:05 a.m. this 21st day of May and the following bids were received, opened and read aloud for Village of Morrow Highlawn Ave Project CDBG FY 2012 for the Warren County Office of Grants Administration:

Adetla Construction Cincinnati, Ohio	\$ 240,015.75
Ford Development Cincinnati, Ohio	\$ 257,232.25
Brunk Excavating	\$ 144 504 25

Susanne Mason, Warren County Office of Grants Administration will review bid for a recommendation at a later date.

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On motion, bids were closed at 9:15 a.m. this 21st day of May and the following bids were received, opened and read aloud for 2013 Chip Seal Project for the Warren County Engineer's Office:

Ray Hensley, Inc. Springfield, Ohio

\$ 623,547.35

Miller-Mason Paving Co. Hillsboro, Ohio

\$ 443,121.87

Neil Tunison, Warren County Engineer will review bid for a recommendation at a later date.

Michael Shadoan, Facilities Management Director, was present along with Patti Solinski, Evaluation Committee Member, Roger Sorey, Assistant Prosecutor, and a representative from Ferguson Construction Company to present the Evaluation Committee's recommendation on selection of a firm to complete the Warren County Justice Drive Office Building-Design-Build Project.

Mr. Shadoan stated that this is the first design-build project on the County level in the State of Ohio. He also gave background information on the project and stated some of the following reasons Warren County chose to go with the design-build concept:

- 1. Saves money
- 2. Eliminates "up front" risk because all costs are known due to a guaranteed maximum price
- 3. All construction is under one umbrella and the ultimate responsible party is the selected firm

Mr. Shadoan then presented the attached evaluation recommendation and upon discussion, the Board resolved (Resolution #13-0763) adopted to approve the award of preliminary agreement for the Warren County Justice Drive Office Building Design-Build Project to Ferguson Construction Company and authorize the President of the Board to sign relative documents.

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Paul Kindell, Telecommunications Director, was present to explain the "request to attend" form submitted to authorize him and three managers to attend CAD training in Nashville, TN.

Mr. Kindell explained that this is the training that has typically been held in Denver, CO that the managers attend but because it is being held close this year, he felt there were opportunities that would benefit him as well as the managers.

The Board stated their concern relative to so many key employees being out of town at the same time as well as the request for three vehicles being proposed for four people to attend.

Upon further discussion, the Board agreed to allow the three managers to attend the training and to utilize one vehicle. They then requested Mr. Kindell to resubmit the paperwork to reflect the same.

Chris Brausch, Sanitary Engineer, was present for a work session and discussed the following matters:

- 1. Proposed water quality study—Mr. Brausch requested the Board to approve the hiring of an engineering consultant to help optimize the treatment process at the Richard A. Renneker Water Treatment Plant to help reduce brown water complaints with an approximate cost of \$20,000 \$30,000. The Board approved the request.
- 2. Massie-Wayne Sewer Area Upgrade—Mr. Brausch gave an update on the meeting with the Village of Waynesville and presented the five proposed options for the future of wastewater treatment in the area. Upon discussion, the Board determined to issue an RFQ to begin studying the question of Warren County constructing a treatment plant to accommodate current and future flows within the area at an approximate cost of \$10,000 \$20,000
- 3. Snook Road Sanitary Sewer—Several Hamilton Township residents are concerned that sanity sewer service will not be extended to their properties as directed by the courts due to the filing of bankruptcy of Henderson & Bodwell engineering company.
- 4. Brisben Development—the reimbursement agreement for construction of the pump station along Stevens Road in Hamilton Township is expiring. Mr. Brisben would like the Board to extend the reimbursement period due to the economy that has slowed development. The spent approximately \$300,000 to construct the pump station that accommodates their Village on the Green development and oversized for future developments in the area.

On motion, upon unanimous call of the roll, the Board entered into executive session at 11:06 a.m. to discuss union negotiations pursuant to Ohio Revised Code Section 121.22 (G)(4) and personnel matters pursuant to Ohio Revised Code Section 121.22 (G) (1) and exited at 11:48 a.m.

Upon motion the meeting was adjourned.

Tom Ariss, President

Pat Arnold South

David G. Y

I hereby certify that the foregoing is a true and correct copy of the minutes of the meeting of the Board of County Commissioners held on May 21, 2013, in compliance with Section 121.22 O.R.C.

Tina Osborne, Clerk

Board of County Commissioners

Warren County, Ohio



Monday, May 20, 2013

WARREN COUNTY JUSTICE DRIVE OFFICE BUILDING - DESIGN BUILD PROJECT

Design-Build Contractor Recommendation for Award of Preliminary Agreement

The Evaluation Committee, having reviewed the Proposals as submitted from the short-listed Design-Build Contractors, recommends that the Preliminary Agreement for Design-Build Services be awarded to:

FERGUSON CONSTRUCTION COMPANY 2201 Embury Park Road Dayton, Ohio 45414 937.274.1173

SCORING:

The Evaluation Committee members independently scored each Proposal using the predetermined <u>Proposal Evaluation Criteria</u>. The resulting scores were then tallied to determine each Proposer's scoring total and ranking. Please see the attached scoring information and totals. Ferguson Construction Company ranked the highest with a total of 288.5 points out of a possible 300 points.

INTERVIEWS:

As part of the evaluation and final selection due diligence, phone interviews of Design-Build Contractor references were conducted based on a pre-established questionnaire. Interviews were randomly selected from the required Proposal references and the Statement of Qualification (SOQ) project references. The interview results of the highest-ranking Proposal are attached and were considered in the final selection and recommendation of award to the Board of County Commissioners.

EVALUATION COMMITTEE:

The Evaluation Committee originally convened in November 2012 to rank the received SOQs and establish a DB Contractor short-list which subsequently received distribution of the Project Request for Proposal (RFP). The recommendation of award above is the result of the ranking of the received short-listed Proposals. The Evaluation Committee is comprised of the below County employees:

Michael Bunner, Director of Emergency Services
Patty Solinski, Business Manager of the Water and Sewer Department
Michael Shadoan, AIA, Director of Facilities Management

The Evaluation Committee was assisted in the above process by Roger Sorey, ESQ of the Warren County Prosecutor's Office, Civil Division.

WARREN COUNTY JUSTICE DRIVE OFFICE BUILDING - DESIGN BUILD PROJECT

Proposal Evaluation Scoring Totals

		FERGUSON CONSTRUCTION CO.	TURNBULL WAHLERT CONSTRUCTION, INC.	STAFFCO CONSTRUCTION, INC
Evaluation Criteria	Weighting	Score	Score	Score
Project Team Organizational Chart/Matrix	30 points	28 points	30 points	28 points
Past Record of Performance	30 points	30 points	28 points	30 points
Project Management and Approach	60 points	52.5 points	57.8 points	32 paints
Project Understanding and Technical Criteria	60 points	60 points	56 points	25.5 points
Overall Proposal Format and Clarity	30 points	30 points	30 points	25 points
Pricing Criteria and Breakdowns	90 points	88 points	80 points	50 points
TOTALS	300 points	288.5 points	281.8 points	190.5 points

NOTE: please see attached individual Proposal Evaluation Criteria scoring sheets as submitted by the Evaluation Committee members. Individual Proposal scoring was performed independently by each Committee member and submitted for tabulation.



Monday, April 29, 2013

Freguson-97.5

Warren County Justice Drive Office Building – Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical Proposal Criteria</u> for further information on scoring.

- 1. Project Team Organizational Chart/Matrix
 - a. Team Qualifications.
 - b. Key project personnel qualifications.
 - c. Experience in Design Build projects of similar scope.
 - Commitment and availability of DB team to project.
 - Other relevant, specialized technical experience.
- 2. Past Record of Performance -
 - Design and Construction experience on similar projects.
 - b. Quality of previous work.
 - c. Successful project completions on schedule and budget.
 - Response from references (phone interviews).
- 3. Project Management and Approach
 - a. Management approach and plan. 3.3
 - b. Technical approach, 3,3
 - c. Project cost and schedule tracking systems. 3.3
 - d. Cost control. 3.3
 - e. Quality assurance and quality control program. 3.3
 - Value analysis. If very little done on paper but had some ideas).
- 4. Project Understanding and Technical Criteria -
 - a. Overall understanding of project program and issues.
 - b. General approach to integration of multiple design elements associated with project.
 - c. Familiarity with site.
 - d. Familiarity with requirements of schematic design and project intent.
 - e. Features provided which exceed the minimum design criteria.
 - f. Building Systems detail, explanation, or narrative.
 - g. <u>Preliminary Project Description</u> or Specification.
 - Other <u>Technical Proposal Criteria</u> as requested in RFP.
- Overall Proposal.
 - a. Package completed in accordance with RFP requirements and instructions.
 - b. Proposal layout and clarity.
 - c. Proposal detail.
 - d. Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.
 - a. Demonstrated ability to meet budget requirements.
 - b. Preliminary Services Price Proposal (Proposal Form 4) evaluation.

10 points.

10 points.

-20-points 17.5 points

20 points.

10 points.

30 points.



Monday, April 29, 2013

Ferguson - 97

Warren County Justice Drive Office Building - Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the Technical Proposal Criteria for further information on scoring.

1. Project Team - Organizational Chart/Matrix -

10 points.

- Team Qualifications.
- Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.

2. Past Record of Performance -

10 points.

- Design and Construction experience on similar projects.
- b. Quality of previous work.
- 5uccessful project completions on schedule and budget.
- Response from references (phone interviews). Did not call anyone.

3. Project Management and Approach -

24-20-215 17 points

- Management approach and plan.
- b. Technical approach.
- c. Project cost and schedule tracking systems.
- d. Cost control.
- e. Quality assurance and quality control program.
- Value analysis. Little Value analysis, but I think they were trying to follow the RFP

Project Understanding and Technical Criteria -

20 points.

- a. Overall understanding of project program and issues.
- General approach to integration of multiple design elements associated with project.
- c. Familiarity with site.
- Familiarity with requirements of schematic design and project intent.
- e. Features provided which exceed the minimum design criteria.
- Building Systems detail, explanation, or narrative.
- g. Preliminary Project Description or Specification.
- h. Other Technical Proposal Criteria as requested in RFP.

Overall Proposal.

10 points.

- Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- Fast-Track: preliminary schedule of services, construction, and final occupancy.

6. Pricing Criteria and Breakdowns.

30 points.

- Demonstrated ability to meet budget requirements.
- b. Preliminary Services Price Proposal (Proposal Form 4) evaluation.

This company has done a lot of homework and studied this project. RFP was put together well and they let it known in the interview that they followed Mike's orders to a tee as far as constructing the building as designed. They were ready willing and able to discuss cost saving options as far as the design, but they did not bring those changes in writing. They were very familiar with the site.



Monday, April 29, 2013

Ferguson - 94 points

Warren County Justice Drive Office Building – Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical</u> <u>Proposal Criteria</u> for further information on scoring.

Project Team – Organizational Chart/Matrix –

8 points.

- a. Team Qualifications.
- b. Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.
- 2. Past Record of Performance -

10 oo ms.

- a. Design and Construction experience on similar projects.
- b. Quality of previous work.
- c. Successful project completions on schedule and budget.
- d. Response from references (phone interviews). EXCELLENT.
- 3. Project Management and Approach -

18 points.

- a. Management approach and plan 3.2
- b. Technical approach 3.0
- c. Project cost and schedule tracking systems 3.2
- d. Cost control ~ 3.0
- e. Quality assurance and quality control program 3.0
- f. Value analysis 2.6

4. Project Understanding and Technical Criteria - EXCELLENT

20 points.

- Overall understanding of project program and issues.
- b. General approach to integration of multiple design elements associated with project.
- c. Familiarity with site.
- d. Familiarity with requirements of schematic design and project intent.
- e. Features provided which exceed the minimum design criteria.
- f. Building Systems detail, explanation, or narrative.
- g. Preliminary Project Description or Specification.
- h. Other Technical Proposal Criteria as requested in RFP.
- 5 Overall Proposal EXCELLENT

10 points.

- a. Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- d. Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.

28 points.

- Demonstrated ability to meet budget requirements 8 (higher const, cost breakdown).
- Preliminary Services Price Proposal (Proposal Form 4) evaluation 20 (lower overall fee structure).



Monday, April 29, 2013

Turnbull- 97.8

Warren County Justice Drive Office Building – Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical Proposal Criteria</u> for further information on scoring.

- 1. Project Team Organizational Chart/Matrix
 - a. Team Qualifications.
 - b. Key project personnel qualifications.
 - c. Experience in Design Build projects of similar scope.
 - d. Commitment and availability of DB team to project.
 - e. Other relevant, specialized technical experience.
- 2. Past Record of Performance
 - a. Design and Construction experience on similar projects.
 - b. Quality of previous work.
 - c. Successful project completions on schedule and budget.
 - d. Response from references (phone interviews).
- 3. Project Management and Approach
 - a. Management approach and plan. 3.3
 - b. Technical approach. 3.3
 - c. Project cost and schedule tracking systems. 2.3 (seemed to have schedule concerns)
 - d. Cost control. 2.3 (likes to share ideas and could get costly)
 - e. Quality assurance and quality control program. 3.3
 - f. Value analysis. 3.3
- 4. Project Understanding and Technical Criteria
 - a. Overall understanding of project program and issues.
 - b. General approach to integration of multiple design elements associated with project.
 - c. Familiarity with site.
 - d. Familiarity with requirements of schematic design and project intent.
 - e. Features provided which exceed the minimum design criteria.
 - f. Building Systems detail, explanation, or narrative.
 - g. Preliminary Project Description or Specification.
 - h. Other Technical Proposal Criteria as requested in RFP.
- Overall Proposal.
 - a. Package completed in accordance with RFP requirements and instructions.
 - b. Proposal layout and clarity.
 - c. Proposal detail.
 - d. Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.
 - a. Demonstrated ability to meet budget requirements.
 - b. Preliminary Services Price Proposal (Proposal Form 4) evaluation.

10 points.





20 points.



10 points.

30 points.



Monday, April 29, 2013

Turnbull-Wahlert 95

Warren County Justice Drive Office Building – Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical Proposal Criteria</u> for further information on scoring.

1. Project Team - Organizational Chart/Matrix -

10 points.

- a. Team Qualifications.
- b. Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.
- 2. Past Record of Performance -

10 points.

- a. Design and Construction experience on similar projects.
- b. Quality of previous work.
- Successful project completions on schedule and budget.
- d. Response from references (phone interviews).
- 3. Project Management and Approach -

20 Points

- a. Management approach and plan.
- b. Technical approach.
- c. Project cost and schedule tracking systems.
- d. Cost control.
- e. Quality assurance and quality control program.
- f. Value analysis.
- 4. Project Understanding and Technical Criteria -

20 points.

- a. Overall understanding of project program and issues.
- General approach to integration of multiple design elements associated with project.
- c. Familiarity with site.
- d. Familiarity with requirements of schematic design and project intent.
- e. Features provided which exceed the minimum design criteria.
- f. Building Systems detail, explanation, or narrative.
- g. Preliminary Project Description or Specification.
- h. Other Technical Proposal Criteria as requested in RFP.
- 5. Overall Proposal.

10 points.

- a. Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.

16-6-8-5.

a. Demonstrated ability to meet budget requirements.

25 Points

b. Preliminary Services Price Proposal (Proposal Form 4) evaluation.

Turnbuil did not include their pricing in the written proposal. We did obtain preliminary pricing at the interview. Turnbuil's Percentage of the project costs for actual work performance was almost 5% more than Fergusons. I prefer the bulk of the money going into the building. Turnbuil interviewed extremely well, extremely confident in the team that they have assembled if awarded this project.



Warren County Department of Facilities Management

Monday, April 29, 2013

Turniculi Wahlert - 89 goint:

Warren County Justice Drive Office Building - Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical Proposal Criteria</u> for further information on scoring.

Project Team – Organizational Chart/Matrix –

Trans Overlines

a. Team Qualifications.

- b. Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.
- 2. Past Record of Performance -

8 points.

10 noints.

- a. Design and Construction experience on similar projects.
- b. Quality of previous work.
- c. Successful project completions on schedule and budget.
- d. Response from references (phone interviews). No response.
- 3. Project Management and Approach EXCELLENT

20 paints.

- a. Management approach and plan 3.5
- b. Technical approach 3.3
- c. Project cost and schedule tracking systems 3.3
- d. Cost control 3.3
- e. Quality assurance and quality control program 3.3
- f. Value analysis 3.3
- 4. Project Understanding and Technical Criteria -

16 paints.

- a. Overall understanding of project program and issues.
- b. General approach to integration of multiple design elements associated with project.
- c. Familiarity with site.
- d. Familiarity with requirements of schematic design and project intent.
- e. Features provided which exceed the minimum design criteria.
- f. Building Systems detail, explanation, or narrative.
- g. Preliminary Project Description or Specification.
- h. Other Technical Proposal Criteria as requested in RFP.
- 5. Overall Proposal EXCELLENT

10 paints.

- a. Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- d. Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.

25 points.

- a. Demonstrated ability to meet budget requirements 15 (lowest const. cost breakdown).
- Preliminary Services Price Proposal (Proposal Form 4) evaluation 10 (good overal) fee structure).



Monday, April 29, 2013

STAFFCO-67.5

Warren County Justice Drive Office Building - Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the Technical Proposal Criteria for further information on scoring.

1. Project Team - Organizational Chart/Matrix -10 points. Team Qualifications. b. Key project personnel qualifications. c. Experience in Design Build projects of similar scope. d. Commitment and availability of DB team to project. e. Other relevant, specialized technical experience. 2. Past Record of Performance -10 points. a. Design and Construction experience on similar projects. b. Quality of previous work. Successful project completions on schedule and budget. Response from references (phone interviews). 3. Project Management and Approach -20 points 8 paints a. Management approach and plan. 2 b. Technical approach. 3 Project cost and schedule tracking systems. 1 (no real plan just counted 365 days). d. Cost control. 0 (no plan) Quality assurance and quality control program. 1 (did not get that detailed for RFP). Value analysis. Hivery little done CE did NONE) 4. Project Understanding and Technical Criteria --20-points-- 125 Overall understanding of project program and issues, 1 (did not read RFP well) b. General approach to integration of multiple design elements associated with project, 2.5 c. Familiarity with site, 1 d. Familiarity with requirements of schematic design and project intent. 1 (CE was not prepared) e. Features provided which exceed the minimum design criteria. 1 (HVAC had options) f. Building Systems detail, explanation, or narrative. 1 (seemed boiler plate)

5. Overall Proposal.

Package completed in accordance with RFP requirements and instructions. 2.5

Other Technical Proposal Criteria as requested in RFP, 2.5 (contractors prepared

b. Proposal layout and clarity. 1 (seemed boiler plate)

Preliminary Project Description or Specification. 2.5

Proposal detail. 1 (seemed boiler plate)

Fast-Track: preliminary schedule of services, construction, and final occupancy. 2.5

6. Pricing Criteria and Breakdowns.

a. Demonstrated ability to meet budget requirements, 15

Preliminary Services Price Proposal (Proposal Form 4) evaluation, 5 (25% of budget for admin).

-10 points(

---**30 points.** 20



Monday, April 29, 2013

Staffco - 60

Warren County Justice Drive Office Building - Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the Technical Proposal Criteria for further information on scoring.

1. Project Team - Organizational Chart/Matrix -

10 paints.

- a. Team Qualifications.
- b. Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.

2. Past Record of Performance -

10 points.

- Design and Construction experience on similar projects.
- b. Quality of previous work.
- c. Successful project completions on schedule and budget.
- Response from references (phone interviews). I did not do phone interviews.

3. Project Management and Approach -

20-16 AL

10 Points

Management approach and plan.

b. Technical approach

- c. Project cost and schedule tracking systems.
- d. Cost control.
- Quality assurance and quality control program. €.
- Value analysis.

4. Project Understanding and Technical Criteria -

20 44144

a. Overall understanding of project program and issues.

5 points

- b. General approach to integration of multiple design elements associated with project.
- Familiarity with site. Not sure if they even looked at the sight.
- Familiarity with requirements of schematic design and project intent.
- Features provided which exceed the minimum design criteria.
- Building Systems detail, explanation, or narrative. HVAC presentation did their homework.
- Preliminary Project Description or Specification.
- h. Other Technical Proposal Criteria as requested in RFP.

Overali Proposal.

10 points.

- Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- d. Fast-Track: preliminary schedule of services, construction, and final occupancy.

6. Pricing Criteria and Breakdowns.

20 solets points

- a. Demonstrated ability to meet budget requirements. Did not see this within the RFP nor was it presented at
- b. Preliminary Services Price Proposal (Proposal Form 4) evaluation. Out of the three proposals, they had the highest amount for Preliminary Design. More than double what the other two proposed.

Written Proposal seemed to correlate with project, but the interview did not bring the elements together. Not sure if this group ever discussed our project before the interview. Not sure if this team ever worked together before.

inwritten proposal project cost

Is not mentioned. Not sure if

they put pencil to paper.



Warren County Department of Facilities Management

Monday, April 29, 2013

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Warren County Justice Drive Office Building – Design Build Project

Proposal Evaluation Criteria

Combination of Performance and Pricing Criteria should be evaluated. Please refer to the <u>Technical Proposal Criteria</u> for further information on scoring.

1. Project Team - Organizational Chart/Matrix -

8 points.

- a. Team Qualifications.
- b. Key project personnel qualifications.
- c. Experience in Design Build projects of similar scope.
- d. Commitment and availability of DB team to project.
- e. Other relevant, specialized technical experience.

2. Past Record of Performance -

10 points.

- a. Design and Construction experience on similar projects.
- b. Quality of previous work.
- c. Successful project completions on schedule and budget.
- d. Response from references (phone interviews).

3. Project Management and Approach -

14 points.

- a. Management approach and plan 3
- b. Technical approach + 2.0
- c. Project cost and schedule tracking systems 2.5
- d. Cost control 2.0
- e. Quality assurance and quality control program 2.5
- f. Value analysis 2.0

4. Project Understanding and Technical Criteria -

8 points.

- a. Overall understanding of project program and issues.
- General approach to integration of multiple design elements associated with project.
- c. Familiarity with site.
- d. Familiarity with requirements of schematic design and project intent.
- e. Features provided which exceed the minimum design criteria.
- f. Building Systems detail, explanation, or narrative.
- g. Preliminary Project Description or Specification.
- Other Technical Proposal Criteria as requested in RFP.

Overali Proposal.

8 paints.

- a. Package completed in accordance with RFP requirements and instructions.
- b. Proposal layout and clarity.
- c. Proposal detail.
- Fast-Track: preliminary schedule of services, construction, and final occupancy.
- 6. Pricing Criteria and Breakdowns.

15 points.

- a. Demonstrated ability to meet budget requirements.
- b. Preliminary Services Price Proposal (Proposal Form 4) evaluation.

Proposal not well thought out and team did not seemed prepared or organized. Heavy on FED Gov. work.



Warren County Department of Facilities Management

Wednesday, May 15, 2013

Contractor Reference Interview Questions

Contractor: Ferguson Construction Respondent: OSU, Woody Hayes Athletic Center.

Previous SOQ Project reference.

Interview questions answered by: Don Patko, OSU Project Manager, 614,292,6330.

- 1. What type of project did the Contractor perform for you and what method of construction delivery? Multi-Prime.
- 2. What was the initial budget for the project vs. final cost? \$20 million.
- 3. On a scale of 1-10, how would you rate the Contractor's ability to keep the project on budget? 10. Came in under budget.
- 4. Did the Contractor provide value engineering on the Project to maintain budget and/or enhance the Project? YES.
- 5. On a scale of 1-10, how would you rate the contractor's ability to keep the construction on schedule? For instance, were the sub-contractors scheduled logically and kept on schedule? Were long lead-time items ordered sufficiently in advance? 10. Project came in 2 months early.
- 6. On a scale of 1-10, how would you rate the Contractor's supervision on the project? Was there consistent and sufficient on-site supervision and coordination? 10. Excellent.
- 7. On a scale of 1-10, how would you rate the Contractor's overall management and approach to the Project? 10. Excellent. They truly controlled the project and kept it moving. Most importantly, they kept the subs straight which is difficult on a multiple prime job.
- 8. On a scale of 1-10, how would you rate the Contractor's ability to adhere to the contract documents? If problems, please elaborate. 10.
- 9. On a scale of 1-10, how would you rate the Contractor's willingness/ability to work with your organization in carrying out the intent of the project? 10.

- 10. On a scale of 1-10, did the Contractor respond in a timely manner to your questions and concerns on the job? Did the Contractor resolve any issues or concerns quickly and accommodate your organization? 10.
- 11. Approximately how many RFI's did the Contractor submit? NA.
- 12. Approximately how many change order requests did the Contractor submit?
- 13. Did the Project run over budget due to change orders? NO.
- 14. When change orders were necessary, were these due to requests from the Owner or due to Contractor issues? NA.
- 15. Were there any stop notice, lawsuits, liens or other legal notices involved with the Project? NO.
- 16. On a scale of 1-10, what overall rating would you give the Contractor? 10.
- 17. In the future, would you use this contractor for a future project? Yes, in fact, OSU is already using Ferguson on another Project under Don Palko's management.
- 18. Additional comments: Don stated that working with Ferguson was refreshing. They are a smaller firm without the name recognition of the bigger CM firms that typically do work at the University. OSU seems to always have performance problems with the bigger CM firms whereas Ferguson did an excellent job. Most importantly, he stated "They are more a home-grown firm, they are very honest, truthful, and do what they say. They get the job done and keep their subs in line."



Wednesday, May 15, 2013

Contractor Reference Interview Questions

Contractor: Ferguson Construction Respondent: Koenig Administrative Offices, Ray Koenig, 937, 693, 5010.

- 1. What type of project did the Contractor perform for you and what method of construction delivery? 6 projects total. Design-Build.
- 2. What was the initial budget for the project vs. final cost? Varies.
- On a scale of 1-10, how would you rate the Contractor's ability to keep the project on budget?
 Only overrun was generated by Owner for LEED certification.
- 4. Did the Contractor provide value engineering on the Project to maintain budget and/or enhance the Project? Yes. LEED and energy efficiency.
- 5. On a scale of 1-10, how would you rate the contractor's ability to keep the construction on schedule? For instance, were the sub-contractors scheduled logically and kept on schedule? Were long lead-time items ordered sufficiently in advance? 10. Only problems were due to Owner's preferred subs. Owner would not use their preferred subs in the future. Better project if Ferguson handles all aspects. Excellent scheduling and coordination.
- 6. On a scale of 1-10, how would you rate the Contractor's supervision on the project? Was there consistent and sufficient on-site supervision and coordination? 10.
- 7. On a scale of 1-10, how would you rate the Contractor's overall management and approach to the Project? 10. Weekly progress meetings.
- 8. On a scale of 1-10, how would you rate the Contractor's ability to adhere to the contract documents? If problems, please elaborate. 10.
- 9. On a scale of 1-10, how would you rate the Contractor's willingness/ability to work with your organization in carrying out the intent of the project? 10.
- 10. On a scale of 1-10, did the Contractor respond in a timely manner to your questions and concerns on the job? Did the Contractor resolve any issues or concerns quickly and accommodate your organization? 10.

- 11. Approximately how many RFI's did the Contractor submit? NA
- 12. Approximately how many change order requests did the Contractor submit? Small amount due to LEED requested by Owner.
- 13. Did the Project run over budget due to change orders? Only due to LEED and geo-thermal HVAC system requested by Owner.
- 14. When change orders were necessary, were these due to requests from the Owner or due to Contractor issues? Owner.
- 15. Were there any stop notice, lawsuits, liens or other legal notices involved with the Project? NO.
- 16. On a scale of 1-10, what overall rating would you give the Contractor? 10.
- 17. In the future, would you use this contractor for a future project? Have and will continue to use.
- 18. Additional comments: Overall better project if Contractor allowed to handle all aspects of construction.



Warren County Department of Facilities Management

Wednesday, May 15, 2013

Contractor Reference Interview Questions

Contractor: Ferguson Construction Respondent: Jamestown Medical Center,

Premier Health Partners.

Dr. Kevin Sharrett, 937.603.6942, Greene County Coroner.

- 1. What type of project did the Contractor perform for you and what method of construction delivery? Design-Build.
- 2. What was the initial budget for the project vs. final cost? \$3.4 million.
- 3. On a scale of 1-10, how would you rate the Contractor's ability to keep the project on budget? 10. Came in \$50k below budget.
- 4. Did the Contractor provide value engineering on the Project to maintain budget and/or enhance the Project? YES. Facility was to be expanded in the future and Ferguson determined no-cost ways to allow for future growth.
- 5. On a scale of 1-10, how would you rate the contractor's ability to keep the construction on schedule? For instance, were the sub-contractors scheduled logically and kept on schedule? Were long lead-time items ordered sufficiently in advance? 10. Excellent coordination. Met all milestones. Delivered on-time.
- 6. On a scale of 1-10, how would you rate the Contractor's supervision on the project? Was there consistent and sufficient on-site supervision and coordination? 10. Excellent on-site supervision & project management. Open lines of communication. Weekly, extensive project meetings with Ferguson.
- 7. On a scale of 1-10, how would you rate the Contractor's overall management and approach to the Project? 10. Excellent. Project Manager was on site at least once a week. Doug Fortkamp identified issues quickly, controlled subs, and kept project moving forward.
- 8. On a scale of 1-10, how would you rate the Contractor's ability to adhere to the contract documents? If problems, please elaborate. 10.
- 9. On a scale of 1-10, how would you rate the Contractor's willingness/ability to work with your organization in carrying out the intent of the project? 10.

- 10. On a scale of 1-10, did the Contractor respond in a timely manner to your questions and concerns on the job? Did the Contractor resolve any issues or concerns quickly and accommodate your organization? 10.
- 11. Approximately how many RFI's did the Contractor submit? NA
- 12. Approximately how many change order requests did the Contractor submit? Very few but all due to upgrades requested by Owner.
- 13. Did the Project run over budget due to change orders? NO.
- 14. When change orders were necessary, were these due to requests from the Owner or due to Contractor issues? Owner.
- 15. Were there any stop notice, lawsuits, liens or other legal notices involved with the Project? NO.
- 16. On a scale of 1-10, what overall rating would you give the Contractor? 10.
- 17. In the future, would you use this contractor for a future project? YES.
- 18. Additional comments: This was a very difficult project. They were converting an old 44,000 sf factory into Medical Office, Clinic, and ambulatory care facility. The entire building was stripped including the exterior and re-created. There were a lot of unknowns going into the project which Ferguson handled perfectly and stayed within budget. In the words of Dr. Sharrett "They far exceeded my expectation and I would use them again in a minute. Ferguson went above and beyond."



Wednesday, May 15, 2013

Contractor Reference Interview Questions

Contractor: Ferguson Construction Respondent: Greg Edwards, The Glen at St. Joseph, 937, 264, 4606.

- 1. What type of project did the Contractor perform for you and what method of construction delivery? Design-Build
- 2. What was the initial budget for the project vs. final cost? Approx. \$20 million.
- 3. On a scale of 1-10, how would you rate the Contractor's ability to keep the project on budget? 10 came in 300k under budget including change orders.
- 4. Did the Contractor provide value engineering on the Project to maintain budget and/or enhance the Project? Yes, specifically for unforeseen circumstances. Spring/pool discovered while excavating. Value engineering allowed remediation without increase to project cost.
- 5. On a scale of 1-10, how would you rate the contractor's ability to keep the construction on schedule? For instance, were the sub-contractors scheduled logically and kept on schedule? Were long lead-time items ordered sufficiently in advance? 10. On-time.
- 6. On a scale of 1-10, how would you rate the Contractor's supervision on the project? Was there consistent and sufficient on-site supervision and coordination? 10. Weekly progress meetings and reports.
- 7. On a scale of 1-10, how would you rate the Contractor's overall management and approach to the Project? 10. Very involved and consistent communication.
- 8. On a scale of 1-10, how would you rate the Contractor's ability to adhere to the contract documents? If problems, please elaborate. 10.
- 9. On a scale of 1-10, how would you rate the Contractor's willingness/ability to work with your organization in carrying out the intent of the project? 10.
- 10. On a scale of 1-10, did the Contractor respond in a timely manner to your questions and concerns on the job? Did the Contractor resolve any issues or concerns quickly and accommodate your organization? 10. Very proactive.

- 11. Approximately how many RFI's did the Contractor submit? NA
- 12. Approximately how many change order requests did the Contractor submit? Only a few change orders due to site issues. Budget maintained.
- 13. Did the Project run over budget due to change orders? NO.
- 14. When change orders were necessary, were these due to requests from the Owner or due to Contractor issues? Unforeseen circumstance.
- 15. Were there any stop notice, lawsuits, liens or other legal notices involved with the Project? NO.
- 16. On a scale of 1-10, what overall rating would you give the Contractor? 10.
- 17. In the future, would you use this contractor for a future project? YES.
- 18. Additional comments: This is a Foundation owned by a family trust. Ferguson was very involved in assuring the project went well. "They went above and beyond to be at any events for the Foundation and keep the family in the loop."



Wednesday, May 15, 2013

Contractor Reference Interview Questions

Contractor: Ferguson Construction Respondent: Avetec, Jeff Johnson, 937.322.5000.

Previous SOQ Project reference.

Retired County Administrator of Clarke County before joining Avetec.

- 1. What type of project did the Contractor perform for you and what method of construction delivery? D-B-B
- 2. What was the initial budget for the project vs. final cost? \$7.9 million.
- 3. On a scale of 1-10, how would you rate the Contractor's ability to keep the project on budget? 10.
- 4. Did the Contractor provide value engineering on the Project to maintain budget and/or enhance the Project? YES. Sitework issues regarding civil engineering provided by others.
- 5. On a scale of 1-10, how would you rate the contractor's ability to keep the construction on schedule? For instance, were the sub-contractors scheduled logically and kept on schedule? Were long lead-time items ordered sufficiently in advance? Excellent workflow. Project on-time and scheduled maintained.
- 6. On a scale of 1-10, how would you rate the Contractor's supervision on the project? Was there consistent and sufficient on-site supervision and coordination? Excellent, Jim Reed maintained workflow and communication.
- 7. On a scale of 1-10, how would you rate the Contractor's overall management and approach to the Project? Weekly project meetings which included Project Manager and Superintendent. Paperwork moved very quickly.
- 8. On a scale of 1-10, how would you rate the Contractor's ability to adhere to the contract documents? If problems, please elaborate. 10.
- 9. On a scale of 1-10, how would you rate the Contractor's willingness/ability to work with your organization in carrying out the intent of the project? 10.
- 10. On a scale of 1-10, did the Contractor respond in a timely manner to your questions and concerns on the job? Did the Contractor resolve any issues or

concerns quickly and accommodate your organization? 10. Very brisk construction pace and well organized.

- 11. Approximately how many RFI's did the Contractor submit? NA
- 12. Approximately how many change order requests did the Contractor submit? Very few and were associated with either Architect or Civil Engineer, outside consultants.
- 13. Did the Project run over budget due to change orders? 1% due to civil engineering.
- 14. When change orders were necessary, were these due to requests from the Owner or due to Contractor issues? Civil Engineering issues.
- 15. Were there any stop notice, lawsuits, liens or other legal notices involved with the Project? NO.
- 16. On a scale of 1-10, what overall rating would you give the Contractor? 9.5 since no one deserves a 10.
- 17. In the future, would you use this contractor for a future project? Absolutely.
- 18. Additional comments: Excellent record keeping and submittals. This was a project constructed with a Federal Grant and Davis Bacon so was heavy on paperwork. High marks given for accurate accounting and disclosure.



PROPOSAL FORM 4

PRELIMINARY SERVICES PRICE PROPOSAL

Provide the lump sum price for providing all labor, materials, equipment, and services necessary to complete the work contained in the Modified Standard Form of Preliminary Agreement between Owner and Design-Builder, DBIA Document No. 520

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Provide the percentage of the Guaranteed Maximum Price attributable to each of the Work Items listed below. The percentage provided below shall not be modified without the written approval of the Owner.

Work Items	Percentage
Design Services Fee (for all design services necessary to complete the Project not included as part of the Preliminary Services Fee)	3.0 %
Preconstruction Fee	0.5 %
Design-Build Services Fee	3.5 %
General Conditions	5.5 %
Cost of the Work (excluding contingency)	86.0 %
Contingency	1.5 %
Total	100% of the GMP

Provide the percentage that the Design-Builder shall apply to additions and deletions to the Cost of the Work to account for the Design-Builder's Fee and for the fees, overhead and profit for all



design consultants and subcontractors of any tier on the Project. The percentage provided herein shall include all fees, overhead and profit of the Design-Builder and for all design consultants and subcontractors of any tier for any additive and deductive change orders on the Project. The percentage provided below shall not be modified without the written approval of the Owner.

Fee for additive and deductive change orders, including the fees, overhead and profit of the Design-	
Builder and for all design consultants and subcontractors of any tier	Proposed Percentage Fee
Additive Change Orders	15.0 %
Deductive Change Orders (Reduction)	(5_0_%)

Provide proposed durations for the following major milestones. The durations provided below shall not be modified without written approval of the Owner.

Major Milestone Durations	Proposed Durations in Work Days
Completion of the preliminary services	41 days
From award of preliminary services to submission of the GMP	30 days
From acceptance of the GMP to Project completion	<u>257 days</u>

Provide proposed durations for any interim milestones which the Design-Builder anticipates on the Project.

Proposed Interim Milestone Durations	Proposed Durations in
	Work Days