



# LAKE COUNTY, FL

## On Call Construction Estimating Services

21-0927

July 1, 2021





July 1, 2021

Bill Ponko, Contracting Officer  
Lake County, FL  
PO Box 7800  
315 W. Main Street, Suite 441  
Tavares, FL 32778

**Re: On Call Construction Estimating Services  
Proposal No: X71445**

Mr. Ponko,

CHA Consulting, Inc. (CHA) is pleased to submit our qualifications for consideration to provide On Call Construction Estimating Services to Lake County, FL.

Our cost estimating team has provided comprehensive and accurate cost estimating services nationwide for more than 30 years. The CHA team comprises five full-time cost estimators, including architectural, civil, structural, mechanical, and electrical cost estimating specialists. We maintain an extensive cost database of the information gained by working on various project types in a variety of locations throughout the United States. In addition, our team has contacts with suppliers, subcontractors, general contractors, and construction managers nationwide, whose insights help us understand fluctuating market costs and regional valuation better.

As part of the design and construction team, our estimators play a significant role from the beginning of a project. In addition to the estimated construction costs, we advise on overall project budget and scheduling, quality assurance, and life-cycle cost analyses. CHA will customize our suite of services to accommodate the needs of Lake County.

We provide qualified and accurate estimates taking into account market conditions, including supply chain analytics, which directly correlate to the decision-making process. Our strength is our no-nonsense approach and our ability to look at each project individually while tapping into our expansive knowledge to provide comprehensive cost estimates.

Thank you again for this opportunity. If you should have any questions about this proposal or need additional information, please contact me at (617) 865-8726 or [jbirenbaum@chacompanies.com](mailto:jbirenbaum@chacompanies.com).

Sincerely,

A handwritten signature in black ink, appearing to read 'JB', written over a light blue horizontal line.

Jeffrey Birenbaum  
*Vice President Cost Estimating and Commercial Services  
Business Practice Leader*

A handwritten signature in black ink, appearing to read 'Dom Bernardo', written over a light blue horizontal line.

Dom Bernardo  
*Chief Financial Officer*

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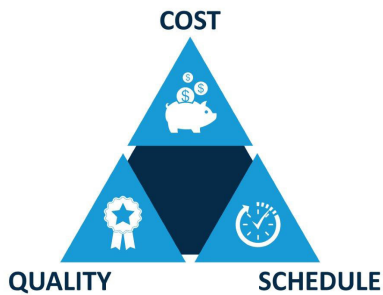
**Section 7: Litigation**



# Section 1

## Vendor Profile

# Statement of Interest and Understanding of Project



## Statement of Interest

CHA, as a multi-disciplinary firm, is able to leverage and utilize each division to support the services of each group. As the cost estimating group, we do not produce estimates in a vacuum. We utilize the capacity and bench of our entire firm when we are estimating any built environment estimate to ensure our accuracy accounts for construction methodology, value engineering as well as flushing out scope design gap or overlap in the process. Our group has over 100 years of experience and includes two quantity surveyors. We believe in our people and promote personal and professional development, leading to job satisfaction and the capacity to provide a quality product for our clients versus just showing up for a job. We estimate a project as if it's our own money and image we are building it. Our interest lies in providing accurate estimates and, in doing so, creating a long-term relationship with our clients who trust our economics and market intelligence in our estimating. We welcome Lake County to experience this journey with us and allow us the opportunity to illustrate and deliver our services.

## Statement of Understanding



Our cost estimating group produces an average of \$348 million construction value of estimates per month for vertical construction. The County's 21 leased spaces, regardless of footprint, fall within our wheelhouse. Our estimates are for small renovations or large new build projects running about 23 to 26 actual estimates per month at varying design phases. Our value engineering and contract negotiations expertise is bar none. Change order mitigation and budget management are what we do day in and day out. We do this all collaboratively and in the best interests of the project and client. We are fair and reasonable but stern when it comes to the science and accuracy of the math in estimating. We understand budgets must be kept and that our hard and soft cost estimating is what drives decisions for our clients and stakeholders. We must be accurate and know the market economics, so our estimates account for today's costs and forecast for the future because of the design, procurement, and construction timelines.

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## Our Team at a Glance

**1,350** multi-disciplined staff

**40+** offices globally

**68** years in business

**#50** Engineering News Record's (ENR) ranking of top 500 design firms

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## Volume of Construction Estimates

**2019** \$3B

**2020** \$4.2B

**2021** \$1.4B (as of April 2021)

**Average** \$358M estimated per month

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## Markets we Support

Aviation  
Transportation  
Government  
K-12 Education  
Higher Education  
Manufacturing  
Healthcare  
Environmental  
Utilities  
Commercial/Private  
Sports & Recreation

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*Responsibly Improving The World  
We Live In*

# Firm Profile

## Introduction

Founded more than 69 years ago, CHA provides full-service design that is rooted in community ideals and responsive to the landscape and local aesthetic. Our people thrive on collaboration, working as part of project team, listening to our clients' needs, and concentrating on modern design.

We are a multi-disciplined architectural, engineering, and construction management consulting firm, with an aspiration to responsibly improve the world we live in. Together, the CHA team includes more than 1,350 technical professionals throughout the United States and Canada, providing a national platform to combine art and science to rethink, refine and reshape the built environment.

## Cost Estimating and Management

Accurate cost predictions facilitate a more strategic approach to broad-scale expenditures. We base our cost estimating services on fundamental quantity surveying principles to create realistic and actionable budgets. We make sure that clients receive maximum value, expenditure is controlled, and cost is kept within the agreed budget, preventing cost overruns.

CHA has provided detailed and accurate cost estimates nationwide for more than 30 years. Working throughout the United States has enabled us to develop an extensive cost database of information on virtually every project aspect.

Our services include:

### Cost Estimating

- Master Planning
- Initial Concept Review
- Market Conditions and Cost Research
- Life-Cycle Cost Analysis
- Green and Sustainable Initiatives
- Construction Options
- Value Engineering and Value Management
- Reconciliation and Negotiation
- Cost Management
- Change Order Mitigation

### Cost Management

- Actual Cost Reports: Budget vs. Committed vs. Actual Costs
- Change Order Log Tracked Against CSI Division and Responsibility
- Risk Log Identifying Exposure to Extra Hard & Soft Costs
- Invoice Log
- Payment Requisitions Compilation and Review of Lien Waivers
- Lien Waiver Log Through All Tiers
- Notice to Owner Log (Sub-contractor's Lien Rights Filing)
- Project Closeout – Final Cost Report
- Cost Dispute Resolutions
- Contract Negotiation

# Team Overview

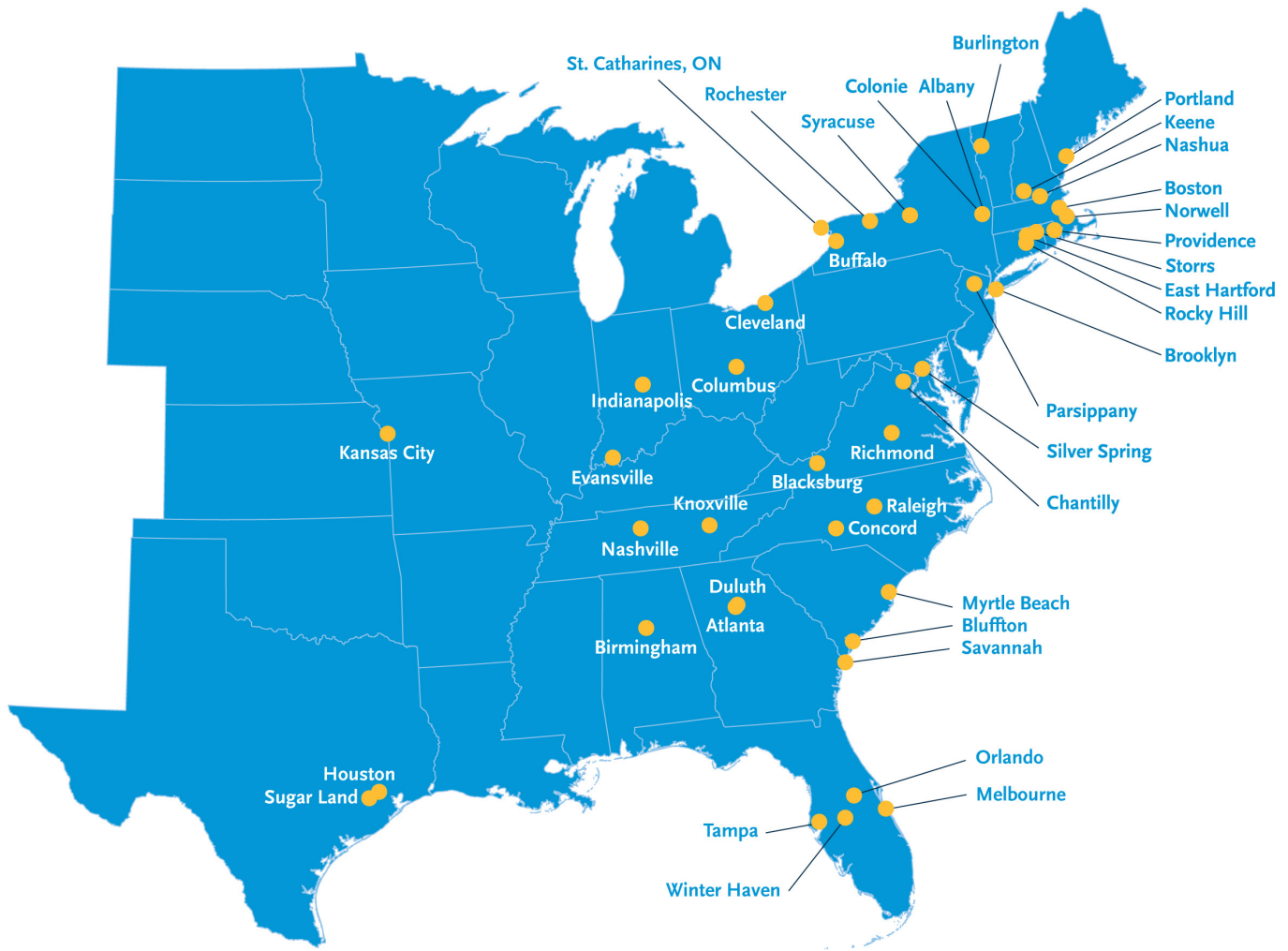
Our cost estimating team delivers high-quality, accurate cost consulting services to owners, architects, and construction managers at any stage from conceptual design through construction documents. Our experienced team includes specialists in architectural, structural, civil, mechanical, and electrical estimating. We bring cost certainty to a project and identify the implications of decisions, not just the dollars and cents.

Our nationwide network of contacts and careful analysis of bid results ensures that we have the most up-to-date information regarding market costs and regional valuation. Our cost estimators take pride in producing estimates that are accurate, prompt, and comprehensive. In addition

to basic estimating services, we can advise clients on value management strategies, overall project budget, and project scheduling; assess life-cycle costs; and perform reconciliations.

Our cost estimators are well-informed about current construction market pricing across regions and for a wide variety of building types. In addition to an extensive cost database of information from current projects, our team has contacts with suppliers, subcontractors, general contractors, and construction managers nationwide, whose insights help us to better understand fluctuating market costs and regional valuation.

## Office Locations



List no more than five projects which best illustrates qualifications relevant to the Solicitation. References must be less than five years old. LIST no more than two LAKE COUNTY GOVERNMENT PROJECTS (past, current, prime, and subcontractor) FIRST.

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CHA Consulting, Inc.

PROJECT NAME: Albany Riverfront Pump Station  
Agency: New York State Office of General Services  
Address: 36th Floor, Corning Preserve, Empire State Plaza  
City, State, Zip code: Albany, NY 12242  
Contact Person: Brian Wilcox  
Title: Project Executive  
Email: bwilcox@chacompanies.com  
Telephone: (518) 453-2848  
Project Cost: \$9.9 M

Contract Start and End Dates: 2019 – Currently under Construction

SCOPE of Project (list tasks, outlines or descriptions of items): Installation of new wedge-wire screen system at existing 60MGD pumping station along the Hudson River downtown Albany, NY. New retrievable mechanical brush screens to be mounted on structural steel superstructure with precast concrete intake chamber manifold foundations. Continuous operation of pump station throughout construction creates need for complex high volume/high demand volatility bypass pumping operation.

PROJECT NAME: Bee Slough River Floodgate  
Agency: City of Evansville  
Address: 1620 E Walnut Street  
City, State, Zip code: Evansville, IN 47714  
Contact Person: Jonathan Mireaux  
Title: Project Manager  
Email: jmireaux@chacompanies.com  
Telephone: (317) 780-7264  
Project Cost: \$2.5 M

Contract Start and End Dates: 2020 - currently in Design Phase

SCOPE of Project (list tasks, outlines or descriptions of items): Construction of new levee flood gate to prevent backflow off Ohio river into the Bee Slough. Project design challenges included poor soils and need for auger cast piles installed 20' below the abutting road and creating pathway on top of structure to maintain existing sidewalk.

PROJECT NAME: Whitcomb Court Boiler Room Renovation  
Agency: Richmond Redevelopment & Housing Authority  
Address: 901 Chamberlayne Parkway  
City, State, Zip code: Richmond, VA 23220  
Contact Person: Erik Wolfe



Title: Principal Engineer

Email: ewolfe@chacompanies.com

Telephone: (973) 805-6886

Project Cost: \$3 M

Contract Start and End Dates: 2020 – currently in bidding phase

SCOPE of Project (list tasks, outlines or descriptions of items): The project consisted of the equipment replacement of 59 boiler rooms.

PROJECT NAME: Daniel F. Burns Apartments

Agency: Cambridge Housing Authority

Address: 362 Green Street

City, State, Zip code: Cambridge, MA 02139

Contact Person: Daniel Chen

Title: Principal

Email: DChen@bhplus.com

Telephone: (617) 350-0450

Project Cost: \$53 M

Contract Start and End Dates: 2020 - 2020

SCOPE of Project (list tasks, outlines or descriptions of items): The project consisted of the renovations of 144,485 sf with (198) elderly housing apartments, including new mechanical, electrical systems, and Code compliance upgrades

PROJECT NAME: Boston Public Library McKim Building Improvements

Agency: City of Boston

Address: 1 City Hall Square #500

City, State, Zip code: Boston, MA 02201

Contact Person: Janette Blackburn

Title: Principal

Email: JBlackburn@shepleybulfinch.com

Telephone: (857) 383-4127

Project Cost: \$110 M

Contract Start and End Dates: 2020 – Currently in design phase

SCOPE of Project (list tasks, outlines or descriptions of items): CHA provided cost estimating services during Design Phase for renewal and restoration of 235,000gsf historic Public Library.

# Organizational Chart

## LAKE COUNTY, FL





# Jeffrey Birenbaum

## Partner-in-Charge

Jeff has more than 25 years of experience in real estate, development and construction project management. He has overseen large and complex building projects in hospitality, residential and mixed-use development sectors. He is skilled at balancing the successful delivery of projects focusing on budget, schedule and quality. Jeff's expertise includes construction project development, management, progress monitoring and reporting, cost control and negotiation, risk management, facilities, operations, and dispute management.

He has served as the owner's strategic project advisor and representative on and off site in Florida, Massachusetts, Georgia, New York, Illinois, Maine and Grand Cayman and is a Massachusetts Certified Public Purchasing Official (MCPPO) for Owners and Project Managers. Representative project experience includes:

### **Massachusetts Division of Capital Asset Management and Maintenance (DCAMM), Statewide Facility Assessment**

CHA is providing DCAMM with an overview of their methodology and process for estimated costs of construction and total project costs, including assessing and providing for a standardization for all 6,000 + of the Commonwealth's physical assets of varying building types. Included in the study is determining replacement cost value for Massachusetts's many historic buildings.

### **Cain International, Raffles Boston Backbay Hotel and Residences**

CHA is providing owner's representative services to Cain International for Raffles Boston Backbay, the first hotel and residences in North America for the Raffles brand. The luxury complex will feature 146 branded residences and 147 hotel rooms in a new 33-story building.

### **Highgate Hotels, The Newbury Boston Hotel**

The Newbury Boston Hotel is reopening as a boutique hotel in Boston's Backbay. CHA is providing quality assurance - quality control, change order mitigation and scheduling services for the facility's five-star roof-top restaurant.

### **Town of Kittery, Rice Public Library Renovation and Expansion**

CHA is providing owner's project management and cost estimating services to the Town of Kittery, Maine for renovations and an addition to the historic Rice Library building. The project includes expanded parking, updated utilities and site work.

### **Projects performed under prior practice:**

- Encore Group (The Rise), Boca Rotan, FL
- Soho House Beach House, Miami Beach, FL
- Peninsula 124 Premium Office Hub, N. Miami, FL
- Aloft-A Vision of W Hotels, Miami Beach, FL
- Gates Hotel, Miami Beach, FL
- Faena Penthouses and Marina, Miami Beach, FL
- Barneys, Bal Harbour, FL
- Dream Hotel & Residences, Atlanta, GA
- Highgate Hotels (Keys Collection), Key West, FL
- 9 Indian Creek (30k SF single family), Miami, FL
- Pinnacle Condominiums, Sunny Isles, FL
- St. Regis S802, Bal Harbour, FL

### **Education**

*University of Miami, FL,  
Master of Real Estate  
Development & Urbanism  
University of Pittsburgh, PA  
B.S., Psychology*

### **Registrations & Certifications**

*Massachusetts Certified Public  
Purchasing Official (MCPPO) for  
Owner/Project Managers*

### **Memberships & Affiliations**

*Dale Carnegie Leadership  
Immersion Program  
82 hours of total training*

*University of Miami, FL  
School of Architecture  
Interdisciplinary Lecturer*

*Connecticut Building Congress  
Judge, 2019*



# Delwyn Williamson

## Program Manager

Delwyn has more than 30 years of experience in the A/E/C industry and serves as CHA's Cost Estimating Group Leader. She is affiliated with the New Zealand Institute of Quantity Surveyors, where she received her registration in Quantity Surveying. Her expertise in vertical cost consulting encompasses all design phases for buildings of all types and she specializes in conceptual estimating. Representative project experience includes:

### **Education**

*New Zealand Institute  
of Quantity Surveyors  
B.S., Quantity Surveying*

### **Memberships & Affiliations**

*Associate Member of the  
New Zealand Institute  
of Quantity Surveyors, Inc.*

### **Adrienne Arsht Center for the Performing Arts Miami-Dade County**

Cost estimating services for the \$300M renovation of the Art Deco Sears Tower, the construction of two new buildings, the 2,400-seat Sanford and Dolores Ziff Ballet Opera House with a 200-seat flexible-space Studio Theater, and the 2,200-seat Carnival Concert Hall, and a 57,000 SF Plaza for the Arts.

### **Town of Franklin, Fire Headquarters**

Cost estimating services for new construction of a 22,000 SF Fire Headquarters building at the existing site. The new facility includes a town emergency command center, decontamination areas for emergencies involving hazardous materials, and a new walk-in medical services room.

### **Town of Carver, New Central Fire Station and Training Facility**

Cost estimating services for a new 21,830 SF Fire Station and Training Facility. Project was awarded the Firehouse Magazine 2017 Gold Station Design Award for Best Volunteer/Combination Fire Station.

### **Lake Matoaka Amphitheater, College of William and Mary**

Renovations to existing amphitheater with new construction of a canopy, bathroom building and full performance equipment.

### **Richmond Center Stage, Richmond, VA**

Historic restoration and renovations with new construction two additional venues.

### **Medford Housing Authority, Saltonstall Building**

Cost Estimating Services for modernization of a 168,812 SF tower building serving 200 units of elderly and disabled residents. Included masonry repairs, roofing replacement and energy and mechanical system upgrades.

### **City of Marlborough, Goodnow Brothers Elementary School**

Cost Estimating Services for a new \$54M, 111,437 SF K-5 elementary school with a design enrollment of 610 students. The city and MSBA-funded 'MSBA Model School' project was successfully completed approximately \$10M under budget and one month ahead of schedule.

### **Hammonasset Beach State Park, New Bathhouse & Boardwalks**

Phased construction of a new 3,620 SF bathhouse structure and new boardwalks from the bathhouse area. Included demolition of the existing structure.



# Brian Wilcox

## Scheduler

With more than 15 years of experience in project management, construction management, and project controls, Brian has been instrumental throughout his career in managing projects from concept through closeout, exceeding expectations while meeting his client's cost, quality, and schedule needs. Representative project experience includes:

### **Education**

*Westfield State University, M.A.,  
B.S., English Literature/ Critical  
Theory*

### **Certifications**

*Massachusetts Certified Public  
Purchasing Official (MCPPO)*

### **NYS Office of General Services, Riverfront Pump Station**

Provided Construction Management services commencing during design development for the phased \$15M renovation to the existing cooling water intake station.

### **General Dynamics, Fiscal Year 2019 Omnibus - Fire Control Systems Design/ Production/Integration\***

Managed a team of task leads, planners/schedulers and cost analysts from Notice of Award through the Integrated Baseline Review including a variety of stages of design, production, integration, and training, and the formal response to action items and findings.

### **NYS Office of General Services, Woodbourne Correctional Facility, Special Housing Unit\***

Recruited to provide Project Management for final document delivery for the design of a high-profile renovation to the Special Housing Unit at the medium-security Woodbourne Correctional Facility estimated at \$6.5M.

### **NYS Office of General Services, Enterprise Scheduling Group\***

Provided project management services for the development, implementation, and maintenance of a planning/scheduling section within the Project Control wing of the Office of General Service Design and Construction group.

### **Various Clients, Scheduling Manager / Project Auditor\***

Provided regional project audits for a portfolio of more than \$150M in projects including schedule, cost, and quality audits related to preconstruction and construction services. Projects consisted of new construction and renovation within Higher Education and hospitality markets.

### **General Dynamics, Columbia Manufacturing Production Space\***

Provided OPM services on a key \$6.1M portfolio project to assist in space creation for production and storage in a secured and occupied facility. Service required cost, schedule, and risk review to be implemented for design phase selection and construction for early abatement and structural package and main construction bid package.

*\*Project performed prior to joining CHA*



# Kevin Putney

## Senior Cost Estimator

Kevin has more than 15 years of experience as a commercial construction cost estimator. He has a college degree background in architecture and construction management. Kevin brings extensive knowledge of the construction industry to each project gained through his experience working for general contractors, construction managers and independent cost estimating firms. Project sectors that he has been involved in are K-12, higher education, healthcare, senior living, transportation and municipal facilities. Representative project experience includes:

### **Education**

*Wentworth Institute of Technology  
Boston, MA  
B.S., Facilities Management*

### **Registrations & Certifications**

*Construction Supervisor - MA  
(#076143)*

### **Memberships & Affiliations**

*American Society of Plumbing  
Engineers*

### **University of Massachusetts Lowell, Innovation Hub & M2D2\***

Cost estimating services for a project focused on creating varied and technologically-rich environments for collaboration and to provide labs for biomedical startup firms.

### **Madison Park Development Corporation, Smith House\***

Cost estimating services during schematic design phase to explore alternative scope for repair and reprogramming to a 12-story, 132-unit senior housing high-rise.

### **Town of Belmont, Middle & High School**

Cost estimating services for a \$295M renovation of a 312,700 SF school and 132,000 SF expansion to include added facilities and incorporate grades 7 and 8.

### **City of Marlborough, George H. Mitchell Elementary School**

Cost estimating services for new construction of a \$54.3 M, 111,437 SF "model" elementary school.

### **Worcester Housing Authority, 275 Pleasant Street Facade Restoration**

Cost estimating services for exterior façade repairs to an eight-story residential housing tower building.

### **Town of Leominster, New Police Station**

Cost estimating services for a \$28M project to construct a 30,000 SF, three-story police headquarters.

### **Town of Dennis, New Fire Station**

Cost estimating services for a new 14,000 SF Fire Station facility to replace the current outdated facility. The new building will have a three-bay drive through apparatus bay, training room, offices, and sleeping quarters.

### **Town of Lincoln, Lincoln Elementary School Expansion**

Cost estimating services for a \$76M project involving additions and renovations to a 165,000 SF elementary school.

### **City of Brockton, New Public Safety Facility Complex**

Cost estimating services for a feasibility study for a new multi-building public safety complex.

*\*Project performed prior to joining CHA*



# Chapman Deng

## Cost Estimator

Chap joined the CHA team in 2005. He specializes in architectural and structural estimating and is advanced in the use of On-screen Take-Off (OST) technology. Representative project experience includes:

### **Education**

*Wentworth Institute of Technology  
B.S., Civil Engineering Technology*

### **Memberships and Affiliations**

*Association of General Contractors  
of America*

*Massachusetts Building Congress*

*Greater Boston Chamber of  
Commerce*

### **Princeton University, Lake Campus Graduate Housing**

Cost estimating services for new three-story wood framed student residential halls encompassing more than 330,000 SF of space. The project created 604 new beds, associated common and support spaces, and small retail shell space.

### **Pelli Clarke Pelli, Hackley School**

Cost estimating services for demolition of the existing performing arts center and classroom buildings at a prestigious private secondary school. Construction of a performing arts center on a challenging sloped site with tiered plazas and parking.

### **City of Alexandria, Joseph Hensley Park**

Cost estimating services for upgrades to Hensley Park by improving site access, parking and circulation, upgrading the existing softball fields, providing one new synthetic turf field, upgrading and providing new shelters and restroom facilities and renovating the maintenance area. New sports field lighting will be provided for all fields and the overall park landscape will be improved.

### **Town of Chilmark, New Fire Station Complex**

Cost estimating services for a new firehouse and Tri-Town EMS Headquarters campus totaling 9,641 SF. The firehouse will house Chilmark's Volunteer Fire Department and the Tri-Town EMS Headquarters will house EMS services for Chilmark, Aquinnah, and West Tisbury.

### **Town of Dennis, New Fire Substation**

Cost estimating services for a new 14,000 SF fire station facility to replace the current outdated facility. The new building will have a three-bay drive-through apparatus bay, training room, offices, and sleeping quarters.

### **City of Brockton, Public Safety Buildings**

Cost estimating services for a project replacing the existing police and fire stations with new facilities capable of housing a joint emergency services dispatch center, the Brockton Emergency Management Agency, and the Brockton IT Department.

### **City of Marlborough, Public Library Renovation/Expansion**

Cost estimating services for a \$24M renovation and expansion of the Marlborough Public Library. Built in the early 1900s and last renovated in 1969, the library lacks room for meetings and quiet study. A phased design and construction plan will expand the existing facility from 22,300 SF to 38,306 SF.

*\* Project performed in prior practice*



### **Education**

*B.A., Visual Arts*

*Pine Manor College, 2001*

*Graduate Certificate, Business*

*Suffolk University, 2020*

# Sidni Bragg

## **Administrator | Project Controls**

Sidni has overseen the management of project controls and project administration, including protocols, submissions, bid document distribution, contract management, and project accounting on almost \$1B in publicly funded projects. Representative project experience includes:

### **City of New Bedford, South Public Safety Facility**

Project controls services for the first new Police and Fire Station to be built in New Bedford in more than 50 years. It now accommodates six municipal functions: fire, police, emergency medical services, emergency management, fire prevention, and animal control.

### **Town of Carver, New Central Fire Station and Training Facility**

Project controls services for new construction of a 21,830 SF fire station and training facility. Project was awarded the Firehouse Magazine 2017 Gold Station Design Award for Best Volunteer/Combination Fire Station.

### **Town of Franklin, Fire Headquarters**

Project controls services for new construction of a 22,000 SF fire headquarters building at the existing site. The new facility includes a town emergency command center, decontamination areas for emergencies involving hazardous materials, and a new walk-in medical services room.

### **Martha's Vineyard Airport, Aircraft Rescue and Firefighting Facility**

Project controls services for new construction of a 16,945 SF aircraft rescue firefighting facility with three bays and two-story head house.

### **Town of Sharon, Public Safety Facility (Police & Fire)**

Project controls services for a new 35,300 SF, two-story combined police and fire station. The facility was constructed in phases to keep the original DPW facility and police station operational.

### **City of New Bedford, New South Public Safety Center**

Project controls services for a new 25,000 SF facility that includes a four-bay fire station and a police substation.

### **Town of Medfield, Combined Public Safety Facility**

Project controls services for a new 41,022 SF structure to house the fire, police, and EMS departments at the existing site.

### **Town of Oak Bluffs, New Fire/EMS Station**

Project controls services for a new 20,000 SF structure that is home to the Fire, EMS and Emergency Management Departments. The new facility houses training, bunk rooms, offices, a kitchen, and apparatus bays.

### **Town of Chilmark, New Fire Station Complex**

Cost estimating services for a new firehouse and Tri-Town EMS Headquarters campus totaling 9,641 SF. The firehouse will house Chilmark's Volunteer Fire Department and the Tri-Town EMS Headquarters will house EMS services for Chilmark, Aquinnah, and West Tisbury.







# Section 2

## Forms

The undersigned hereby declares that: CHA Consulting, Inc. has examined and accepts the specifications, terms, and conditions presented in this Solicitation, satisfies all legal requirements to do business with the County, and to furnish **On-Call, Construction Cost estimating Services** for which Submittals were advertised to be received no later than 3:00 P.M. Eastern time on the date stated in the solicitation or as noted in an addenda. Furthermore, the undersigned is duly authorized to execute this document and any contracts or other transactions required by award of this Solicitation.

All pricing will be FOB Destination unless otherwise specified in this solicitation document. Pricing submitted will remain valid for a ninety (90) day period.

Vendor will accept payment through the County VISA-based payment system: NO

### **1.0 TERM OF CONTRACT**

The Contract will be awarded for an initial one (1) year term with the option for four (4) subsequent one (1) year renewals. Renewals are contingent upon mutual written agreement.

The Contract will commence upon the first day of the next calendar month after Board approval. The Contract remains in effect until completion of the expressed and implied warranty periods. The County reserves the right to negotiate for additional services/items similar in nature not known at time of solicitation.

Contract prices resultant from this solicitation will prevail for the full duration of the Contract unless otherwise indicated elsewhere. Prior to completion of each exercised term, the County may consider an adjustment to price based on changes as published by the U.S. Department of Labor, Bureau of Labor Statistics. Refer to Exhibit A – Scope of Services. It is the Contractor's responsibility to request in writing any pricing adjustment under this provision.

### **2.0 METHOD OF PAYMENT**

The Contractor must submit an accurate invoice to the County's using department. The date of the invoice must be after delivery but no more than 30 calendar days after delivery. Invoices must reference the: purchase or task order; delivery date, delivery location, and corresponding packing slip or delivery ticket signed by a County representative at the time of acceptance. Failure to submit invoices in the prescribed manner will delay payment.

Payments will be tendered in accordance with the Florida Prompt Payment Act, Part VII, Chapter 218, Florida Statutes. The County will remit full payment on all undisputed invoices within 45 days from receipt by the appropriate County using department. The County will pay interest not to exceed 1% per month on all undisputed invoices not paid within 30 days after the due date.

### **3.0 CERTIFICATION REGARDING LAKE COUNTY TERMS AND CONDITIONS:**

I certify that I have reviewed the [Lake County General Terms and Conditions page](#) and accept the Lake County General Terms and Conditions dated 10/10/2019 as written including the Proprietary/Confidential Information section. **See Attachment A** Failure to acknowledge may result in Submittal being deemed non-responsive.

**4.0 CERTIFICATION REGARDING FELONY CONVICTION:**

Has any officer, director, or an executive performing equivalent duties, of the bidding entity been convicted of a felony during the past ten (10) years? NO

**5.0 CONFLICT OF INTEREST DISCLOSURE CERTIFICATION:**

Except as listed below, no employee, officer, or agent of the firm has any conflicts of interest, real or apparent, due to ownership, other clients, contracts, or interests associated with this project; and, this Submittal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a proposal for the same services, and is in all respects fair and without collusion or fraud. [Click or tap here to enter text.](#)

**6.0 CERTIFICATION REGARDING BACKGROUND CHECKS:**

Under any County Contract that involves Contractor or subcontractor personnel working in proximity to minors, the Vendor hereby confirms that any personnel so employed will have successfully completed an initial, and subsequent annual, Certified Background Check, completed by the Contractor at no additional cost to the County. The County retains the right to request and review any associated records with or without cause, and to require replacement of any Contractor employee found in violation of this requirement. Contractor shall indemnify the County in full for any adverse act of any such personnel in this regard. Additional requirements may apply in this regard as included within any specific contract award. YES

**7.0 DISADVANTAGED BUSINESS ENTERPRISE PROGRAM**

The County does not establish specific goals for minority set-asides however, participation by minority and non-minority qualified firms is strongly encouraged. If the firm is a minority firm or has obtained certification by the State of Florida, Office of Supplier Diversity, (OSD) (CMBE), please indicate the appropriate classification(s) not applicable not applicable and enter OSD Certification Number [Click or tap here to enter text.](#) and enter effective date [Click or tap to enter a date.](#) to date [Click or tap to enter a date.](#)

**8.0 RECIPROCAL VENDOR PREFERENCE:**

Vendors are advised the County has established, under Lake County Code, Chapter 2, Article VII, Sections 2-221 and 2-222; a process under which a local vendor preference program applied by another county may be applied in a reciprocal manner within Lake County. The following information is needed to support application of the Code:

- A. Primary business location of the responding Vendor: [Click or tap here to enter text.](#)
- B. Does the responding vendor maintain a significant physical location in Lake County at which employees are located and business is regularly transacted: Choose an item. If “yes” is checked, provide supporting detail: [Click or tap here to enter text.](#)

**9.0 GENERAL VENDOR INFORMATION:**

Firm Name: CHA Consulting, Inc.

Street Address: 1016 Springs Villas Point

City: Winter Springs State and ZIP Code: FL 32708

Mailing Address (if different): [Click or tap here to enter text.](#)

Telephone: (407) 679-5358 Fax: [Click or tap here to enter text.](#)

Federal Identification Number / TIN: 16-0966259

DUNS Number: 05-864-7470

**10.0 SUBMITTAL SIGNATURE:**

I hereby certify the information indicated for this Submittal is true and accurate and that my electronic signature shall have the same legal effect as if made under oath; that I am an authorized representative of this Vendor and/or empowered to execute this Submittal on behalf of the Vendor. I, individually and on behalf of the Vendor, acknowledge and agree to abide by all terms and conditions contained in this solicitation as well as any attachments, exhibits, or addenda.

Name of Legal Representative Submitting this Proposal:



Date: 6/22/2021

Print Name: Dom Bernardo

Title: Chief Financial Officer

Primary E-mail Address: dbernardo@chacompanies.com

Secondary E-mail Address: [Click or tap here to enter text.](#)

The individual signing this Submittal affirms that the facts stated herein are true and that the response to this Solicitation has been submitted on behalf of the aforementioned Vendor.

*[The remainder of this page is intentionally blank]*

# Attachment A

*Below are our comments on the contract provided by Lake County since we were not able to provide questions or request exceptions by the 6/10/2021 deadline indicated in the RFP.*

If awarded a contract as a result of this solicitation, CHA will require that the indemnification provision in the Lake County General Terms and Conditions and/or the resulting contract be modified to be consistent with industry-standard obligations and professional liability insurance. CHA's recommended provision would read "To the extent permitted by law, the Contractor shall indemnify and hold harmless the County and its officers, employees and instrumentalities from liability, losses or direct damages, including reasonable attorneys' fees and costs of defense, which the County or its officers, employees or instrumentalities incur as a result of a third-party claim for bodily injury or property damage, to the extent caused by the negligence of the Contractor, its employees, agents, servants, partners, principals or subcontractors in connection with the performance of the Contract. The Contractor expressly understands and agrees that any insurance protection required by the Contract or otherwise provided by the Contractor will in no way limit the responsibility to indemnify and hold harmless the County or its officers, employees and instrumentalities as provided in this Contract.





[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Zip Code](#) /

## Detail by Zip Code

Foreign Profit Corporation  
CHA CONSULTING, INC.

### Cross Reference Name

CHA CONSULTING, INC.

### Filing Information

<b>Document Number</b>	F08000004937
<b>FEI/EIN Number</b>	16-0966259
<b>Date Filed</b>	11/17/2008
<b>State</b>	NY
<b>Status</b>	ACTIVE
<b>Last Event</b>	DROPPING DBA
<b>Event Date Filed</b>	04/06/2021
<b>Event Effective Date</b>	NONE

### Principal Address

575 Broadway  
ALBANY, NY 12207

Changed: 02/23/2015

### Mailing Address

575 Broadway  
ALBANY, NY 12207

Changed: 02/23/2015

### Registered Agent Name & Address

CORPORATION SERVICE COMPANY  
1201 HAYS STREET  
TALLAHASSEE, FL 32301-2525

### Officer/Director Detail

#### **Name & Address**

Title CEO

CARROLL, MICHAEL D  
575 BROADWAY  
ALBANY, NY 12207

## Title CFO

BERNARDO, DOM M  
3 WINNERS CIRCLE  
ALBANY, NY 12205

## Title Secretary, General Counsel

PLATT, MICHAEL A  
3 WINNERS CIRCLE  
ALBANY, NY 12205

## Title AS

TITSWORTH, THOMAS DESQ  
3 WINNERS CIRCLE  
ALBANY, NY 12205

## Title President

Stephenson, James  
1 Faneuil Hall Marketplace  
South Market Building, suite 4195  
Boston, MA 02109

**Annual Reports**

<b>Report Year</b>	<b>Filed Date</b>
2019	03/27/2019
2020	01/22/2020
2021	01/18/2021

**Document Images**

<a href="#">01/18/2021 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">01/22/2020 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">03/27/2019 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">03/15/2018 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/28/2017 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">09/22/2016 -- AMENDED ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/09/2016 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/23/2015 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">03/25/2014 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">01/31/2013 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">02/17/2012 -- Amendment</a>	View image in PDF format
<a href="#">01/30/2012 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">04/12/2011 -- FEI# CHANGED</a>	View image in PDF format
<a href="#">03/04/2011 -- ANNUAL REPORT</a>	View image in PDF format
<a href="#">12/28/2010 -- Name Change</a>	View image in PDF format
<a href="#">03/05/2010 -- ANNUAL REPORT</a>	View image in PDF format



<a href="#">04/17/2009 -- ANNUAL REPORT</a>	<a href="#">View image in PDF format</a>
<a href="#">12/18/2008 -- Amendment</a>	<a href="#">View image in PDF format</a>
<a href="#">11/17/2008 -- Off/Dir Resignation</a>	<a href="#">View image in PDF format</a>
<a href="#">11/17/2008 -- Off/Dir Resignation</a>	<a href="#">View image in PDF format</a>
<a href="#">11/17/2008 -- Foreign Profit</a>	<a href="#">View image in PDF format</a>

Florida Department of State, Division of Corporations

# Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

▶ Go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9) for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p><b>1</b> Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>CHA Consulting, Inc.</b></p> <p><b>2</b> Business name/disregarded entity name, if different from above</p>	
	<p><b>3</b> Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only <b>one</b> of the following seven boxes.</p> <p><input type="checkbox"/> Individual/sole proprietor or single-member LLC</p> <p><input checked="" type="checkbox"/> <b>C Corporation</b></p> <p><input type="checkbox"/> S Corporation</p> <p><input type="checkbox"/> Partnership</p> <p><input type="checkbox"/> Trust/estate</p> <p><input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____</p> <p><b>Note:</b> Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is <b>not</b> disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</p> <p><input type="checkbox"/> Other (see instructions) ▶ _____</p>	<p><b>4</b> Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p><b>5</b> Address (number, street, and apt. or suite no.) See instructions. <b>III Winners Circle</b></p> <p><b>6</b> City, state, and ZIP code <b>Albany, NY 12205</b></p>	<p>Requester's name and address (optional)</p>
	<p><b>7</b> List account number(s) here (optional)</p>	

## Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

**Note:** If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

<b>Social security number</b>										
-				-						
<b>or</b>										
<b>Employer identification number</b>										
1	6		-	0	9	6	6	2	5	9

## Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ 01/14/2021
------------------	----------------------------	-------------------

## General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to [www.irs.gov/FormW9](http://www.irs.gov/FormW9).

## Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.*



REAL FLORIDA • REAL CLOSE  
Office of Procurement Services

P.O. Box 7800 • 315 W. Main St., Suite 441 • Tavares, FL 32778

**SOLICITATION:** On-Call Construction Cost Estimating Services

06/17/2021

Vendors are responsible for the receipt and acknowledgement of all addenda to a solicitation. Confirm acknowledgement by including an electronically completed copy of this addendum with submittal. Failure to acknowledge each addendum may prevent the submittal from being considered for award.

THIS ADDENDUM CHANGES THE DATE FOR RECEIPT OF PROPOSALS TO JULY 1, 2021.

**QUESTIONS/RESPONSES**

Question 1. For Section “2. Forms”, would the County please clarify what type of response they are looking for regarding “Descriptive Literature”?

**Answer 1. Any literature provided by the vendor that their discretion that may add support to their proposal**

Q2. Does the County want respondents to include resumes for all proposed staff or only for the Program Manager?

**R2. Please provide the resumes for the proposed staff.**

Q3. For “Section 5. Completed Pricing Sheet”, the second item requests “supporting documentation for proposed pricing”. What is the County looking for in regard to supporting documentation?

**R3. This is for any documentation, at the vendor’s discretion, to clarify any of the items on the pricing sheet.**

Q4. In Section 1.0 – part 1.2 (Attachments – page 2 of 5) – Attachment 2 is the Pricing Sheet and Attachment 4 is Team Composition Form. however, in Section 6.0-E-2 (Delivery and Submittal Requirements - page 3 of 5) Attachment 2 is named the Team Composition Form. Please clarify.

**R4. Section 1.2 ATTACHMENTS shall now read:**

- Attachment 1 – Submittal Form**
- Attachment 2 – Pricing Sheet**
- Attachment 3 – References Form**
- Attachment 4 – Team Composition**

**ACKNOWLEDGEMENT**

Firm Name: CHA consulting, Inc.

I hereby certify that my electronic signature has the same legal effect as if made under oath; that I am an authorized representative of this vendor and/or empowered to execute this submittal on behalf of the vendor.

**ADDENDUM NO. 1**

**21-0927**

Signature of Legal Representative Submitting this Bid:

A handwritten signature in black ink, appearing to read "Dom Bernardo", written in a cursive style.

Date: 6/22/2021

Print Name: Dom Bernardo

Title: Chief Financial Officer

Primary E-mail Address: [dbernardo@chacompanies.com](mailto:dbernardo@chacompanies.com)

Secondary E-mail Address: [Click or tap here to enter text.](#)



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

4/23/2021

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

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

<b>PRODUCER</b> <b>Ames &amp; Gough</b> <b>859 Willard Street</b> <b>Suite 320</b> <b>Quincy, MA 02169</b>	<b>CONTACT NAME:</b> <b>PHONE (A/C, No, Ext): (617) 328-6555</b>	<b>FAX (A/C, No): (617) 328-6888</b>	
	<b>E-MAIL ADDRESS: boston@amesgough.com</b>		
<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>	
<b>INSURED</b>  <b>CHA Consulting Inc.</b> <b>1016 Spring Villas Point</b> <b>Winter Springs, FL 32708</b>	<b>INSURER A : American Casualty Co of Reading, PA A(XV)</b>		<b>20427</b>
	<b>INSURER B : LM Insurance Corporation</b>		<b>33600</b>
	<b>INSURER C : Continental Insurance Company A(XV)</b>		<b>35289</b>
	<b>INSURER D : The First Liberty Insurance Corporation</b>		<b>33588</b>
	<b>INSURER E : New Hampshire Insurance Company</b>		<b>23841</b>
	<b>INSURER F :</b>		

### COVERAGES

### CERTIFICATE NUMBER:

### REVISION NUMBER:

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input checked="" type="checkbox"/> LOC OTHER:			6014087067	8/1/2020	8/1/2021	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 500,000
							MED EXP (Any one person)	\$ 15,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
B	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			AS5-Z11-260446-010	8/1/2020	8/1/2021	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
							\$	
C	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			6014087053	8/1/2020	8/1/2021	EACH OCCURRENCE	\$ 10,000,000
							AGGREGATE	\$ 10,000,000
								\$
D	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y <input checked="" type="checkbox"/> N If yes, describe under DESCRIPTION OF OPERATIONS below			WC6-Z11-260446-020	8/1/2020	8/1/2021	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER	\$
							E.L. EACH ACCIDENT	\$ 1,000,000
							E.L. DISEASE - EA EMPLOYEE	\$ 1,000,000
							E.L. DISEASE - POLICY LIMIT	\$ 1,000,000
E	<b>Professional Liab</b>			002910563	8/1/2020	8/1/2021	<b>Per Claim</b>	6,000,000
E				002910563	8/1/2020	8/1/2021	<b>Aggregate</b>	10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required) If AI box is checked, GL Endorsement Form #CNA75079XX, Auto AI #CA20481013 to the extent provided therein applies and all coverages are in accordance with the policy terms and conditions.

### Evidence of Insurance

### CERTIFICATE HOLDER

### CANCELLATION

For Proposal Purposes

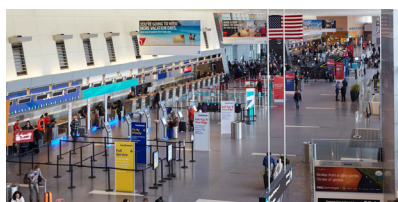
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

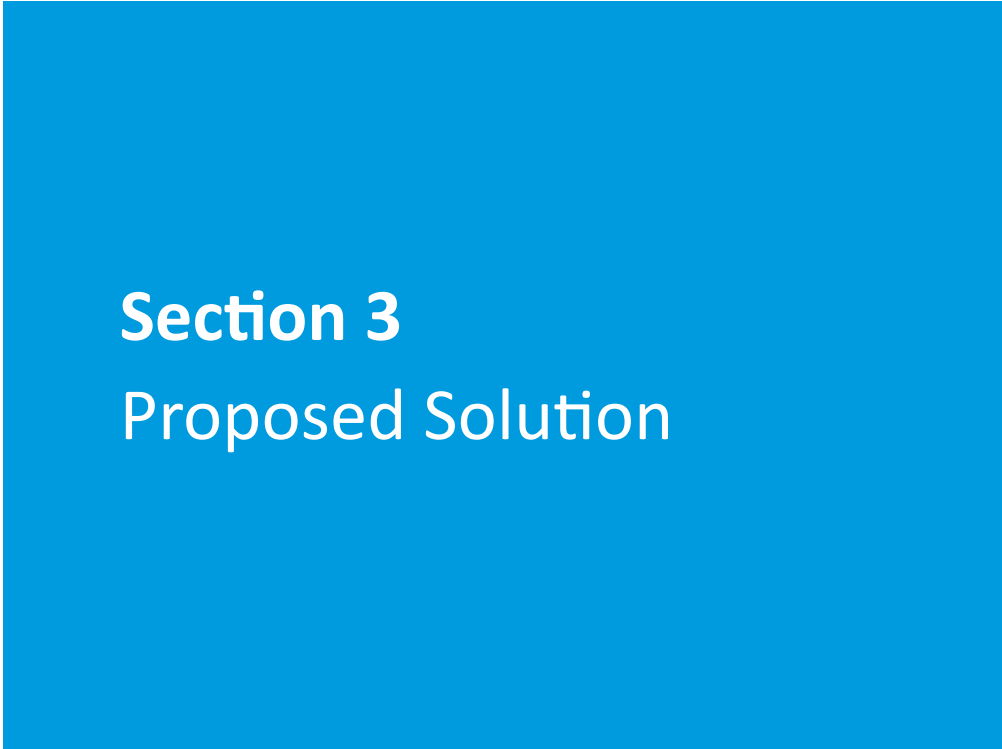



AUTHORIZED REPRESENTATIVE

# Diversity of Clients

Our diverse client base affords us a well-rounded knowledge of every project type. Representative clients include:

- Albany County Airport Authority
- Babson
- Borrego Solar
- Boston College
- Boston Housing Authority
- City of Boston
- Colgate University
- Connecticut Department of Transportation
- Divco
- Dormitory Authority of the State of New York
- Duke University
- Elkus Manfredi
- Eversource
- General Electric
- Gensler
- Georgetown University
- Hanover Inn
- Harvard University
- HMS Host
- Honeywell
- Kaestle Boos Architects
- Mass Development
- Mass MoCA
- Massachusetts DCAMM
- Massachusetts Department of Transportation
- Massachusetts Division of Fisheries and Wildlife
- Massachusetts Institute of Technology
- Massport – Logan Airport
- National Grid
- National Railroad Passenger Corp. (Amtrak)
- New Jersey Transit
- New York State Energy Research & Development Authority (NYSERDA)
- New York State Office of General Services (OGS)
- New York State Office of Parks, Recreation & Historic Preservation
- Pelli Clarke Pelli Architects
- Pepsi Beverages Company
- Perkins & Will
- Port Authority of New York & New Jersey
- Princeton University
- Ropes & Gray
- Saam Architecture
- Sarah Lawrence College
- Sasaki Associates
- Shepley Bulfinch
- Spirit Airlines
- Stantec
- STV Incorporated
- University at Albany
- Turner Construction
- University of Massachusetts
- Urban Edge
- Vertex
- Virginia Department of Conservation & Recreation
- Yale University





# Section 3

## Proposed Solution

# Proposed Solutions

Our diverse client base affords us a well-rounded knowledge of every project type. While we know that each project is unique, we have established a process that applies to various project types, conditions, and parameters. Below is the process we have used successfully and believe it will meet Lake County's needs for this On Call Construction Estimating Services contract.

## Master Planning

We perform comprehensive reviews of master plans for campuses, municipalities, and school districts, providing accurate cost projections that facilitate a more strategic approach to broad-scale capital expenditure.

## Initial Concept Review – Existing Condition Requirements/Complications

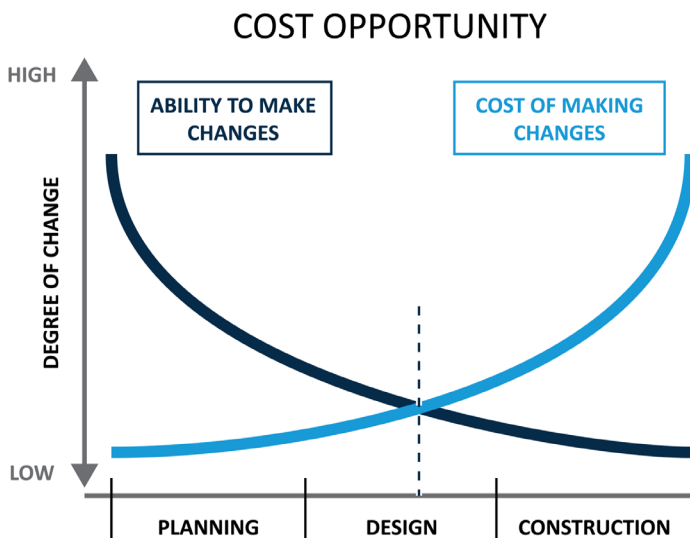
By assessing project feasibility and reviewing the program needs, site elements, and anticipated design features, our estimates help with the development of a more accurate and realistic preliminary budget.

## Market Conditions and Cost Research

We consider information gleaned from nationwide escalation indices, analysis of bid returns, records of historic and current materials costs, and our network of subcontractors across the country. These resources, combined with our extensive experience, help us make highly accurate predictions about project costs.

## Life-Cycle Cost Analysis

Our team provides comprehensive reports that evaluate upfront capital expenditure versus long-term operational costs, with consideration given to program needs and design requirements.



## Green and Sustainable Initiatives

We are experienced in evaluating and estimating plans that integrate alternative energy sources, utilize environmentally-conscious design practices and materials options, and employ LEED construction standards.

## Construction Options

During preliminary planning stages - particularly feasibility studies - our team can help assess the cost, scheduling, and program implications of various construction options. These include weighing new construction against renovation/addition projects, and assessing the relative merit of potential sites.

## Value Engineering and Value Management

We can assess the anticipated function, quality, performance, cost, and value of design elements. We provide impartial information that helps clients make decisions about these elements so that they can get the best possible design for their money, without sacrificing quality.

## Reconciliation and Negotiation

By meeting with other independent cost estimating firms and the design team, we are able to verify that our estimates appropriately quantify design elements, are in line with design intent, and assume the correct means and methods of construction.

## Cost Management

We develop the cost plan in conjunction with the project team as design and construction progress, providing the best possible estimate of the final cost of the project and of the future cash flow.

## Change Order Mitigation

Our team verifies that the change management process is strictly followed at all stages of the project. This is carried out during the construction phase of the project, to demonstrate that otherwise significant delay, cost or danger would have been incurred by awaiting responses.





# Section 4

## Subcontractors/Joint Ventures

# Subcontractors/Joint Ventures

CHA has long standing relationships with local contractors and consultants in multiple disciplines throughout Florida. CHA will be able to execute this contract in-house and will not require subconsultants.



# Section 5

## Completed Pricing Sheet

**CHA Consulting, Inc.**

**SAVE AND SUBMIT AS AN EXCEL FILE**

The Contractor will furnish all labor, materials, tools, transportation and equipment necessary to provide on-call construction cost estimating services to Lake County. Services will be performed in accordance with the specifications listed. Prices must be quoted per estimated hours. Actual hours are unknown and are estimated for evaluation purposes only.

ITEM #	PERSONNEL CLASSIFICATION	TYPICAL WORK TASKS	HOURLY RATE
1	Principal	Leadership	\$250.00
2	Facilities Condition Manager	Physical Plant Assessment and Cost Management	\$250.00
3	Auditor Claims Analyst	N/A	
4	Scheduler	Microsoft Projects Scheduling from beginning	\$150.00
5	Chief Estimator (Architectural / Structural Civil)	QA/QC and project controls	\$225.00
6	Senior Estimator (Mechanical/ Electrical)	Quantity take off and pricing science	\$175.00
7	Estimator	Quantity take off and subcontractor research	\$150.00
8	Administrator	Graphics, Charts, and Presentations	\$105.00

**Please list any additional classifications that your proposes to be added**

ITEM #	PERSONNEL CLASSIFICATION	TYPICAL WORK TASKS	HOURLY RATE
9			
10			
11			
12			
13			

Lake County is exempt from all taxes (Federal, State, Local). A Tax Exemption Certificate will be furnished upon request for any direct purchasing. Contractor will be responsible for payment of taxes on all materials purchased by the Contractor for the project.

Lake County will not accept nor authorize payment for travel time or expenses of service personnel to any of Lake County’s facility locations. The hourly rate must commence on the job site. Billable time will be for service work performed.

This is an indefinite quantity contract with no guarantee use of services. The County does not guarantee a dollar amount to be expended on any contract resulting from this solicitation.

**Supporting Documentation: We can provide confidential payroll backup, as needed, if we are awarded a contract.**

# Section 6

## Financial Stability

# Financial Stability

Established in 1952, CHA is a large firm with over 1,350 personnel in 40+ offices. We have been providing professional engineering services continuously for over 69 years. CHA prides itself in being a forward thinking, yet financially stable company with a long standing reputation for providing cutting edge technical services in all of our disciplines. Our primary goal is to continue to provide quality client services in a manner which will facilitate continued company growth. If selected to perform this work, we will be happy to meet with you and share our confidential financial information.



# Section 7 Litigation

# Litigation

CHA is a large professional engineering firm with over 40 offices throughout the United States and Canada. CHA performs thousands of projects each year. For a firm of its size and diversity, CHA's involvement in legal claims and lawsuits is remarkably infrequent, due chiefly to its competent and well-trained staff and its rigorous and comprehensive Technical Excellence Program. CHA has never had any civil judgments entered against it. However, claims against CHA do occur, and CHA has over the past three years been involved in ordinary civil litigation in the course of its business. CHA is confident in its ability to successfully defend, or settle on favorable terms, all such outstanding claims. Furthermore, for the protection of CHA and its clients, CHA always maintains a comprehensive insurance program which includes professional liability, workers' compensation, comprehensive general liability, automobile and umbrella policies, with limits sufficient to cover the defense and payment of all outstanding claims against CHA. In the opinion of CHA's management, no claim or lawsuit currently pending against CHA will materially affect CHA's ability to perform any ongoing or potential future project.