

SECTION 1

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1. VENDOR PROFILE

A. Statement of Interest & Understanding of Project

I. STATEMENT OF INTEREST

CMI was incorporated in March 1995 primarily to provide cost estimating services. We have provided on-call cost estimating services with agencies such as the Greater Orlando Aviation Authority, Orange County Government, City of Clermont, Manatee County Government, Orange County Public Schools and Seminole State College. In November 2020, we were selected for the award of a continuing contract for these services by the Florida Department of Management Services. In addition, since 2008 CMI has been providing Lake County with Construction Cost Estimating and Scheduling services under Continuing Services Contracts.

Our current staff of 44 includes multiple estimators of all disciplines. Through a combination of our UK Chartered Quantity Surveying and US Construction Management education, we provide public owners with the best attributes needed for professional cost estimating with full accountability and transparency. Our estimates range from the Programming phase thru all Design Phases and Construction Phase change orders.

As described in the Scope of Work/Services (Exhibit A of the Request for Proposal (RFP)), it is CMI's goal to aid, assist and achieve Lake County's goals for their 121 buildings and 21 leased spaces. To support its staff with information and knowledge, the County has issued this RFP to engage the services of a professional Construction Cost Estimating firm. The range of services CMI can provide the County is categorized as follows:

Pre-Design Phase: Capital Construction Budgets and Master Plan Estimates of projects of all sizes and values including life cycle and operational costs.

Design Phase: Value Engineering exercises, and Alternative Design Costs Analysis through design evolution and Proposals; Cost / Benefit Analysis of building systems and shell construction, especially relating to "green" buildings, sustainable design and Leadership in Energy and Environmental Design (LEED) guidelines; detailed estimates (by Construction Specifications Institute (CSI) or Unifomat Elemental Divisions) at Schematic Design, Design Development and Construction Documents phases of design; baseline Critical Path Method (CPM) schedule and milestones; constructability review and coordination of documents.

Bid Phase: Bid Package Preparation, Scope of Work Documentation and Incorporation of Unit Price Schedules; Solicitation / Prequalification / Selection of Bidders; Bid Analysis and Recommendations; Analysis of Construction Manager (CM) or General Contractor (GC) bids / Guaranteed Maximum Price (GMP) proposals; Analysis of General Conditions, Baseline Construction Schedules & Milestones, Proposed Contract Documents, etc.

Construction / Close-out Phase: Assist in preparing and analyzing schedule of values and prepare multiple cashflow projection graphs; evaluate change order proposals and assist with negotiations to establish fair market prices; auditing and claims analysis; provide expert witness and legal testimony.

Operations Phase: Facilities Condition Assessments; cost estimates associated with emergency work or disaster relief efforts.

These services are applicable for either small projects or large scale complex projects, for a variety of projects (construction remodeling, renovation, repair, improvement, systems improvements, extension of County buildings, parks, sites, roadways, utilities, structures and systems) and proposed projects for future development.

We confirm that CMI meets the requirements of this RFP, as follows:

- a) CMI's core business is Cost Estimating. Over the last 26 years, our experience and knowledge has grown and continues to increase in cost benefit analysis of building systems, especially relating to "green" buildings and sustainable design. CMI's staff is highly skilled in preparing complete quantity take-offs, build-up of unit rates based on materials costs / labor hours / equipment costs / subcontractor and vendor quotes, indirect costs and profit mark-ups. Since its incorporation in 1995, CMI has prepared multiple estimates on more than 1,000 projects. CMI currently has continuing cost estimating contracts with several Governmental entities.
- b) CMI has considerable experience in all the items listed in this RFP, as summarized above.

II. UNDERSTANDING OF PROJECT

CMI's goal is that the estimates, schedules, and cash flow forecasts should be more than just a contractual deliverable. They must also be tools that the County can use to its best advantage, to result in a successful project.

Our overall approach starts with a commitment from Ganesh Jiawon (President and Program Manager of CMI) that each assignment will receive the attention and resources that are required to not only meet, but to also exceed the County's expectations. CMI has prepared numerous estimates and schedules on various types of projects for County Governments. We have worked with different Departments, Project Managers and User Groups. Each Task gave us the ability and opportunity to better serve all our clients.

We listen to our clients carefully and understand their needs. In doing this, we can evaluate the unique conditions of each project and assign the most appropriate team. Furthermore, consistent communication with our Clients, Consultants and Designers is key to our overall approach. We encourage dialogue and transparency, further enhancing the Client's ability in the decision-making process.

If we are successful with this RFP, our diligence with Lake County will not falter in the execution of this contract. We also maintain our archive of Lake County project drawings which we can easily access.

We have a clear and complete understanding of the services as defined in the Scope of Work/Services section (page 6 of this RFP) and have gained extensive experience in all of these services over the past 26 years in business. We have learned that every project is unique but the overall approach to each can remain the same, for the most part. The main factors that will cause the overall approach to vary are:

- Type of Project – new or renovation.
- Stage of Design / Bid – concept, preliminary, detailed design, or bidding.
- Method of Procurement – lump sum bid, construction management, or design-build.
- Purpose of Estimate / Schedule – budgeting, fee negotiations, change order measurement, etc.

Our key to addressing a scenario that is comprised of a combination of these factors is CMI's ability to working the plan in place.

B. FIRM PROFILE / FIRM HISTORY

CMI was incorporated in March 1995. Our mission is to provide independent cost consulting, budget preparation and review, scheduling, project management and other related services for the construction industry. As clients benefited from Ganesh Jiawon's unique approach to estimating and his philosophy that the estimate should not only satisfy a contractual obligation, but must also serve as a planning & design tool in the decision-making process for both the Owner and the Design Team, CMI's experience increased. By its 5th anniversary (in March 2000), CMI had provided cost / scheduling services on 170 projects whose total construction value exceeded \$1.0 billion, for forty clients.

CMI's portfolio of services include Estimating, Scheduling, Value Engineering, Life Cycle Cost Analysis, LEED Consulting, Constructability Review, Cashflow Projections, Change Order Analysis, Claims Analysis, Contract Administration, Construction Auditing, Facilities Condition Assessment, Grants Management, Program Management, Project Management, IFM360 Software Development and Software Customization.

Twenty-six years later, this 1-person start-up has turned into a 44-employee company that has provided a broad spectrum of services on hundreds of projects. By demonstrating to Owners and Design firms that projects need early practical cost planning to be successful, CMI won key local contracts.

In 2009, CMI was awarded the Small Business Advocate of the Year Award by the Greater Orlando Aviation Authority for exceptional commitment and dedication to the Authority and for promoting their Small Business Development Programs.

In 2014, CMI was awarded the Consultant of the Year AIA, Orlando Chapter Award in recognition of outstanding dedication to exceptional performance in the critical Customer Service areas of Client Focus, Teamwork, Communication, Project Management, and Specialist Knowledge

CMI is also certified as a Minority Business Enterprise (MBE) by the State of Florida, Department of Management Services Office of Supplier Diversity.

C. ATTACHMENT 3 – REFERENCE FORM

The completed Attachment 3 Reference Form is included on the following three pages.

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.

COST MANAGEMENT INC. d/b/a CMI

PROJECT NAME: Oak Park Middle School

Agency: Lake County Schools

Address: 201 West Burleigh Boulevard

City, State, Zip code: Tavares, Florida 32778

Contact Person: John Carr

Title: Assistant Superintendent – Operations and Facilities

Email: carrj@lake.k12.fl.us

Telephone: 352-253-6521

Project Cost: \$2,461,309

Contract Start and End Dates: November 2020 ~ March 2021

SCOPE of Project (list tasks, outlines or descriptions of items): CMI was retained by Lake County Schools (LCS) to prepare a Facilities Condition Assessment of the multiple buildings at the Oak Park Middle School campus. The task entailed a thorough assessment of moisture intrusion in the buildings' roofs and exterior walls, interior finishes, major mechanical and electrical equipment, and site, using a combination of thermal imaging infra-red technology and visual examination. CMI categorized the findings on a Priority scale and prepared a Rough Order of Magnitude (ROM) Estimate for each Priority. LCS intends to use this independent report as a tool for its asset preservation program and funding allocation over several Fiscal Years.

PROJECT NAME: Orange County Government – Various Projects for County Departments

Agency: Orange County Convention Center

Address: 9800 International Drive

City, State, Zip code: Orlando, Florida 32819

Contact Person: Crystal Mudd

Title: Manager / Capital Planning

Email: Crystal.Mudd@occc.net

Telephone: 407-685-5704

Project Cost: Varies

Contract Start and End Dates: May 2018 ~ May 2022

SCOPE of Project (list tasks, outlines or descriptions of items): Under a continuing contract with the County, CMI provides cost consulting and project management services for County Departments including the Orange County Convention Center and Orange County Utilities. The Contract relates to providing the following services: On Call Construction Cost Estimating, Scheduling, Change Order Management, Project Management, Facilities Condition Assessment, etc. During this period, CMI has worked on numerous estimates at all stages of Planning, Design and Construction, for a variety of projects at OCCC ranging from new addition, renovation, maintenance, roof replacement, mechanical, electrical and sitework projects.

PROJECT NAME: Orange County Public Schools – Various Projects

Agency: Orange County Public Schools

Address: 6501 Magic Way, Building 200

City, State, Zip code: Orlando, Florida 32809

Contact Person: John Morris

Title: Chief Facilities Officer

Email: John.Morris@ocps.net

Telephone: 407-317-3700 Ext. 2025930

Project Cost: Varies

Contract Start and End Dates: January 2016 ~ December 2021

SCOPE of Project (list tasks, outlines or descriptions of items): As one of the Program Management firms, CMI provides On Call Construction Cost Estimating during Advanced Planning, Planning, Design and GMP/Bid Phases; Value Engineering and Life Cycle Cost Analysis; Change Order Management; Scheduling; Project Management; Facility Condition Assessment; and Database Management services. CMI has provided these services on projects including renovation of existing campuses, construction of new relief schools, maintenance and repairs of campus buildings and sites.

PROJECT NAME: Orange County Government - Penthouse Chilled Water Valves

Agency: Hanson Professional Services Inc.

Address: 720 N. Maitland Avenue, Suite 102

City, State, Zip code: Maitland, Florida 32751

Contact Person: William Bradford

Title: Senior Vice President

Email: BBradford@hanson-inc.com

Telephone: 407-622-2050

Project Cost: \$840,339

Contract Start and End Dates: April 2021 ~ February 2022

SCOPE of Project (list tasks, outlines or descriptions of items): Hanson was awarded a continuing contract with Orange County to provide Mechanical and Electrical design services. CMI is the Cost Consultant on Hanson's team to provide On Call Cost Estimating services that range from Rough Order of Magnitude to detailed 100% Construction Documents phase estimates. The above-referenced project consists of the addition of six automated chilled water valves in the Penthouse of the North/South Building at Orange County Convention Center. CMI prepared a 60% Design Estimate which included the Base Estimate and a Bid Additive (Alternate) to allow for temporary cooling. CMI will update this estimate at the 90% Construction Documents phase in June 2021.

PROJECT NAME: Orlando International Airport – Various Projects

Agency: Greater Orlando Aviation Authority

Address: 11308 Terminal C. Service Road

City, State, Zip code: Orlando, Florida 32824

Contact Person: Mike Patterson

Title: Director of Construction

ATTACHMENT 3 – REFERENCES FORM

Email: mpatterson@goaa.org

Telephone: 407-825-2460

Project Cost: Varies

Contract Start and End Dates: December 2015 ~ March 2022

SCOPE of Project (list tasks, outlines or descriptions of items): As one of the Owner's Authorized Representatives, CMI provides Construction Cost Estimating, Change Order Management, Scheduling, Facility Condition Assessment, Inspection and Safety Management services. Projects include the renovation projects in the existing North Terminal and Airfields, and the new Inter Modal Facility, Terminal C, and related projects that are scheduled for opening in 2022.

D. PROGRAM MANAGER

Name: Ganesh Jiawon, MRICS, CGC, LEED AP

Address: 158 Terra Mango Loop
Suite B
Orlando, FL 32835

Email: gj@cminc.biz

Office Phone: 407-293-4168

Mobile Phone: 407-948-8145

(The Program Manager's Resume is included in the end of this Section.)

E. REQUIRED LICENSES OR PERMITS

To the best of our knowledge, the State of Florida does not have any professional licensing requirements for cost estimating services. Copies of our Certificate of Status issued by the State of Florida, Department of State is included in Section 2, Descriptive Literature.

The following is a copy of the Program Manager's General Contractor License (CGC 1505217).

Ron DeSantis, Governor	Halsey Beshears, Secretary
STATE OF FLORIDA DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION CONSTRUCTION INDUSTRY LICENSING BOARD	
LICENSE NUMBER: CGC1505217	EXPIRATION DATE: AUGUST 31, 2022
THE GENERAL CONTRACTOR HEREIN IS CERTIFIED UNDER THE PROVISIONS OF CHAPTER 489, FLORIDA STATUTES	
JIAWON, GANESH PERSAUD COST MANAGEMENT INC 158 TERRA MANGO LOOP SUITE B ORLANDO FL 32835	
ISSUED: 07/22/2020	Always verify licenses online at MyFloridaLicense.com Do not alter this document in any form.
This is your license. It is unlawful for anyone other than the licensee to use this document.	

Key members of CMI have professional credentials in Certified General Contractor (CGC), Chartered Quantity Surveying, Value Engineering, etc. which reinforce our technical ability to provide Lake County with Cost Estimating services. Copies of these certifications are included in Section 3 of this RFP.



EXPERIENCE WITH CURRENT FIRM

Cost Management Inc. dba CMI Orlando, FL March 1995 – Current

Current Job Title – President: Ganesh established this private construction consulting firm in March 1995. CMI is providing all aspects of construction cost and schedule related services on private and public projects. Clients include Owners, Architects, Engineers, Construction Managers, etc. His expertise as a Chartered Quantity Surveyor and skill competence in Construction Management is evidence with the success of a long list of public projects and satisfied Owners.

With the Chartered Quantity Surveying method of cost estimating, Ganesh can **effectively evaluate schemes and strategies** before the standard material take-off strategy of estimating would be possible. This will help the design team understand the **cost implications of major design decisions made early in the process**. This way, **cost can be controlled with effective design-making** on the global scale, rather than incremental shifts late in the process. Life Cycle Costing calculations, even early in the design process can objectively evaluate different schemes in terms of their long-term costs. He and key members of his staff are intimately familiar with changing and current Construction Technology and Project Cost Control techniques.

His expertise includes all aspects of program controls to support Facility Owners. He is involved in all estimating tasks including cost modeling, cost benefit analysis, scope validation & programming estimates, VE & life cycle cost analysis, conceptual budgets, detailed design phase estimates, bid evaluation & analysis, cash flow projections, change order management / negotiations and settlement. He also manages the scheduling assignments that are performed in-house or by subconsultants, and all on-site project management and contract administration services provided by CMI. His involvement in multiple projects in Florida, provides him with a thorough knowledge of local construction activities and a unique perspective of costs of labor and materials that impact the market, are reflected in bid results and labor productivity during construction.

Ganesh’s training, combined with the thorough education and experience he gained with the RICS education, has made him a suitable candidate who is qualified to advise the Owner on all aspects of cost control and contract administration, from a Project’s inception to its completion. He advises the Owner on scope vs budget, estimating updates, bid analysis and recommendations, form of contract and scope classifications, analysis of trade payment breakdown, examination and recommendation of Contractor’s payment requests, and final close-out of the project. Additionally, this training and experience are also evident in document control, whereby minutes of meetings, status reports and other forms of communication flow smoothly among all the parties involved. This document flow ensures nipping problems in the bud, thus allowing for timely communication to provide the Owner with a complete audit trail.

For this contract Ganesh will ensure that projects are adequately staffed and will be supported by other CMI key personnel whose expertise include estimating, value engineering, claims analysis, auditing and contract administration. Under his leadership CMI has successfully provided consulting services (estimating, scheduling, auditing, claims analysis, owner’s representative, project management, etc.) on over 1100 projects. Most were public projects in Orange, Lake, Seminole and Sarasota Counties, Orlando Int’l Airport, Orange County Public Schools, Miami-Dade County Public Schools, University of Central Florida and Broward, Valencia and Seminole Colleges.

Representative Florida projects with CMI

Lake County:

- Courthouse Judicial Center Expansion
- Courthouse New Addition & Renovation Public Defender Bldg.
- Historical Courthouse Renovation
- Sheriff’s Office & EOC
- Animal Services Expansion
- Emergency Operations Center
- Tax Collector’s Office-Site Development
- Fire Station 90
- Lake County Schools, Oak Park Middle School FCA
- Orange County Public Schools
- Orange County Convention Center
- Orange County Utilities
- GOAA United Airlines Bldgs. 407 & 431 FCA
- Polk County Government Center
- Palm Beach County Airport
- Dames Point Marine Terminal
- Volusia County Judicial Analysis

SKILLS IN MANAGING SIMILAR PROJECTS

Lake County Government – Cost Estimating Services Tavares, FL 06/2008 – 09/ 2020

Program Manager: Under continuing services contracts, CMI provided independent, objective, conceptual detailed cost estimates for the County maintenance replacement/ repair projects such as roof repair, M.E.P., fire alarm and security system upgrades; existing structure and lease spaces, exterior and /or interior renovations or additions, and cost estimates for proposed projects for future development. The estimates were used by the County for evaluating, negotiating, and otherwise resolving requests, payment applications, change orders and claims made by construction contractors as well as determine budgets and budget compliance.



Orange County Convention Center – Cost Estimating/Scheduling/PM Services Orlando, FL 05/2018 – 05/2023

Program Manager: The Orange County Convention Center is the 2nd largest in the country and is a 24/7/365 operating facility. Under a continuing Program Management contract with Orange County Government, CMI provides cost estimates that range from Scope Validation to Bid Phase, and analysis of bid results to satisfy procurement rules. Construction costs range from \$100K to \$500M. Most projects are phased and constructed around Events. CMI’s estimates accounts for these with construction schedules that evaluate shift scenarios. CMI has worked at the Center for almost 20 years and maintains a thorough historical cost database.

Greater Orlando Aviation Authority – Change Order Management Services Orlando FL 12/2015 – 04/2022

Program Manager: CMI was responsible for testing and tracking the budget from Concept thru Design Phase, including Value Engineering estimates, and coordinating 3rd party estimates and the requirements of the Owner’s project management and executive team. The project is fast-tracked and awarded to two Construction Management at Risk (CMAR) firms under multiple Bid Packages. During construction, CMI is responsible for preparing detailed material take-offs and building up unit rates (based on historical data and means & methods) for estimates of hundreds of Change Order requests, to support negotiation with the CMAR firms. CMI reviews and reconciles with the Trade Contractors’ estimates, prior to submitting for GOAA’s Construction Committee and Board approval. This involved cohesive teamwork and strict coordination with the Design Team, Financial Management Consultant, Project Managers, and the Small Business Department. In addition to the main project, CMI also prepared independent Design Phase estimates for satellite projects such as the Quick Turn Around (QTA) facility and other projects in the existing North Terminal and Airfields.

Orange County Public Schools – Districtwide Project Controls/PM Services Orlando, FL 02/2012 – 12/2021

Program Manager: CMI is working collectively with the current Program Management firm to provide project controls services and to act on its behalf for delivery of estimating, scheduling and project management support for capital facility programs composed of multiple-site remodeling, renovations, and additions program, and/or a multiple-site new construction program. The scope of work include, but not limited to, facility condition assessment, life cycle cost analysis, conceptual cost estimating, design phase cost estimating, GMP analysis and negotiations, change order estimating and close-out; scheduling for the School District’s construction program; monthly reports and high-level summary reports; database maintenance, and district wide project management support.

CMI provides the full spectrum of cost control services that include establishing budgets during Planning, monitoring and value engineering during Design, and Change Order management during Construction. Using historical cost data we have compiled over the past 20 years, we assist the Owner with most of its cost-related tasks, including establishing & updating budgets, monitoring budgets during Design, negotiating GMP contracts with Construction Managers, negotiating fees with Design Teams and other Specialty Consultants, and measurement & negotiation of Change Orders for Owner approval. Construction costs range from \$100K to \$110M.

EDUCATION / ACADEMIC DEGREES / PROFESSIONAL ASSOCIATION

- Diploma in Quantity Surveying (RICS) - 1993
- B.S. in Construction Management (Pratt Institute) - 1985
- Technician Diploma in Building and Civil Engineering (CGLI) – 1979
- State of Florida, Certified General Contractor (CGC 1505217)
- Green Building Certification Institute LEED Accredited Professional – 2008
- Member of the Royal Institution of Chartered Surveyors, (MRICS), England (Quantity Surveyor) 1979

ROLE AND DUTIES THAT WILL BE PROVIDED TO THE COUNTY

Ganesh will be the Program Manager with ultimate accountability for each Task assigned under this Contract. He will be the main point of contact for the County. His responsibilities include all communication and coordination between the County and the CMI Team. He will assign duties to CMI’s estimating, scheduling and project management staff, and ensure that tasks are completed timely and to the satisfaction of the County. He will lay the groundwork for all the factors that are essential for the smooth delivery of these projects and provide the County with periodic reports on the status of each Project.

As the President of CMI, Ganesh manages a team of other Officers of the Corporation and key Departmental Managers. He will also conduct periodic meetings with Key County Project Managers and staff. He will ensure that enough resources are dedicated towards the timely completion of each Task and maintains client contact during the process. Ganesh also represents CMI in public forums.