



**Statement of Qualifications
For:
On-Call Construction Cost
Estimating Services**

**In Response to Solicitation
Number 21-0927
From:
Lake County, Florida
Office of Procurement Services**

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1.1 Vendor Profile - Statement of Interest and Understanding of Project

Introduction

CSG's project team has significant recent experience providing construction costs and system analysis in cost control, budget monitoring, design estimating, value analysis, construction estimating, building evaluations, budgeting and cost management as well as expert witness testimony. Our versatile and diverse staff includes individuals with backgrounds in architecture, engineering, general contracting and construction management.

Statement of Interest

Costing Services Group, Inc.'s mission is to be an integral part of the design team for the owner and/or architect, starting in the early design phases, in order to provide accurate and timely cost estimates so projects remain on schedule and in budget compliance.

Costing Services Group, Inc.'s core values:

CSG will never artificially match an estimate to an established budget.

CSG will provide real, fair market value project cost analysis.

CSG will work with Owners and the design team to offer money saving options that won't sacrifice design quality or goals.

CSG will provide a cost estimate as close to the scope as possible based on the early documentation so Owners can make informed decisions about the project and ensure project success.

Understanding of Project

To date, CSG has prepared over 650 cost estimates in the state of Florida for local business, municipalities, corporations, architects and engineers.

CSG, in its 42 years of business, has participated in multiple IDIQ contracts including: Georgia State University, Georgia Institute of Technology, the City of Atlanta and DeKalb County, GA. Currently, CSG maintains IDIQ cost estimating contracts with the Tennessee Department of General Services, the City of Savannah and Atlanta Beltline, Inc. As a consultant, CSG provides cost estimating services on multiple other IDIQ contracts including with the Veterans Administration, United States General Services Administration, Jackson Healthcare, Gwinnett County, GA, Oak Ridge National Laboratories, Savannah River Nuclear Site, and Pennsylvania Turnpike, among others.

1.2 Vendor Profile – Firm Profile/Firm History

COSTING SERVICES GROUP, INC. (CSG) has been in the estimating and construction business since 1979 providing services that range from single phase building cost estimates to full Construction Document Estimates and VE evaluations. CSG formulates and communicates useful and meaningful information on construction projects from program inception through final completion. CSG has successfully participated in over 8,000 projects for more than 750 clients in 50 states, the Caribbean, Europe, Africa and Asia.

In our 42-year history, CSG has worked on nearly every project type. CSG's diverse project types include residential, higher education, governmental, medical, power and treatment plants, among others. All Cost Analysts have design and construction experience to relate to each discipline in a meaningful and practical manner. CSG has been a participant on more than 45 award-winning design teams.

CSG is a privately owned corporation. CSG qualifies as a small business and is certified as a 100% Woman Owned Business Enterprise (WBE) or a Disadvantaged Business Enterprise (DBE) by several states and government agencies, including: South Carolina, North Carolina, Florida, Virginia, Ohio, Maryland, Minnesota, New York, New Jersey, Pennsylvania, Connecticut, Massachusetts, Kansas, Kentucky, Indiana, Tennessee, Texas, Illinois, Arkansas, Alabama, and Georgia as well as the City of Atlanta, Fulton County and DeKalb County, Georgia. CSG is an equal opportunity employer.

CSG has extensive experience in IDIQs and on-call construction cost estimating. Currently, CSG performs cost estimating directly for the City of Savannah and the State of Tennessee General Services Administration. Past IDIQs include DeKalb County, GA as well as Georgia Institute of Technology and Georgia State University.

CSG's project team has significant recent experience providing construction costs and system analysis in cost control, budget monitoring, design estimating, construction estimating, building evaluations, budgeting, project scheduling, cost management, value analysis, value engineering, cost-to-complete, change order evaluation and expert witness.

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.

COSTING SERVICES GROUP, INC.

PROJECT NAME: Bay County Water Treatment Plant Operations Building

Agency: Barge Design Solutions

Address: 615 3rd Avenue South, Suite 700

City, State, Zip code: Nashville, TN 37210

Contact Person: Michael B. Vincent, RA

Title: Senior Project Manager

Email: Michael.Vincent@bargedesign.com

Telephone: 615.254.1500

Project Cost: \$2.1 million

Contract Start and End Dates: June 2020 – November 2020

SCOPE of Project (list tasks, outlines or descriptions of items): CSG prepared Construction Documents and Bid Review Documents for this 7,148 SF drinking water treatment This 2-story building sustained substantial damage from Hurricane Michael. The renovation included updated MEP, new offices, updated kitchens, bunkroom and conference room, restrooms, lounge, electrical control room and lab/operations room.

PROJECT NAME: Boca Raton Fire Station No. 6

Agency: Currie-Sowards-Aguila Architects

Address: 185 NE 4th Avenue, Suite 101

City, State, Zip code: Delray Beach, FL 33483

Contact Person: Jose N. Aguila, AIA, LEED AP

Title: Principal

Email: jose@csa-architects.com

Telephone: 561.276.4951

Project Cost: \$4.5 million

Contract Start and End Dates: February 2019 – July 2019

SCOPE of Project (list tasks, outlines or descriptions of items): CSG provided conceptual Phase and 30% Design Development Phase estimates for this 13,055 SF fire station with bunk rooms, a kitchen and dining area, exercise room, hose storage, bathrooms and multipurpose dayroom.

PROJECT NAME: Plantation Key Courthouse and Detention Center

Agency: Currie-Sowards-Aguila Architects

Address: 185 NE 4th Avenue Suite 101

City, State, Zip code: Delray Beach, FL 33483

Contact Person: Jose N. Aguila, AIA, LEED AP

Title: Principal

Email: jose@csa-architects.com

Telephone: 561.276.4951

Project Cost: \$19.1 million

Contract Start and End Dates: June 2017 – May 2018

SCOPE of Project (list tasks, outlines or descriptions of items): CSG provided Schematic Design Phase, Design Development Phase, 50% & 75% Construction Documents Phase estimates on this 51,000 SF 2-story courthouse and 1-story detention center. This project served as a new replacement courthouse, judicial administrative offices, and detention facility for the 16th Judicial Court of Monroe County, Florida.

PROJECT NAME: Forest Park Gillem Public Safety Facility

Agency: Precision Planning, Inc.

Address: 400 Pike Boulevard

City, State, Zip code: Lawrenceville, GA 30046

Contact Person: B. Kent Snyder II, R.A.

Title: Assistant Vice President

Email: 752ks@ppi.us

Telephone: 770.338.8142

Project Cost: \$5.6 million

Contract Start and End Dates: May 2021 - TBD

SCOPE of Project (list tasks, outlines or descriptions of items): CSG provided Conceptual Phase, Design Development Estimates and Budgeting for this 13,206 SF public safety facility.

PROJECT NAME: Ascension Sacred Heart Bay Medical Center Hurricane Damage Assessment

Agency: McNeill Carroll Engineering, Inc.

Address: 475 Harrison Avenue, Suite 200

City, State, Zip code: Panama City, FL 32401

Contact Person: Sean McNeil, P.E.

Title: President/Principal

Email: smcneil@mcneilcarroll.com

Telephone: 850.763.5730

Project Cost: \$300 million

Contract Start and End Dates: May 2019 – June 2019

SCOPE of Project (list tasks, outlines or descriptions of items): Our senior cost estimators performed visual on-site assessments for multiple hospital buildings, including: Bay Hospital Floors 1-6, Bay Surgery Center and Beach Clinic. CSG gave recommendations of repairs. In the case of Bay Surgery Center, CSG recommended demolition. Costing Services provided documentation and quantity surveys of the repairs necessary to the FEMA representative on site.

1.4 Vendor Profile - Program Manager

James E. Greiner, CPE

Company: Costing Services Group, Inc.

Address: 1270 West Peachtree Street NW, Suite 3
Atlanta, GA 30309

Role: Senior Cost Estimator – QC/CA Officer, Operations Manager

Telephone: (404) 815-9555

Email: james@costingservicesgroup.com

Additional Team Members

Burt Jenkins, CPE

Role: Senior Cost Estimator

Email: burt@costingservicesgroup.com

S. Saheb

Role: Cost Estimator

Email: saeid@costingservicesgroup.com

James Greiner, CPE
Senior Cost Estimator
Costing Services Group,
Inc.

Location:
Atlanta, GA

Years of Experience:
20 (18 with CSG, 2 with
others)

Education:
Masters of Science
(Construction
Management), 2007
Southern Polytechnic State
University
Bachelor of Arts, 2003,
University of North Carolina
at Asheville

Training & Certifications:

- Certified
Professional
Estimator (CPE)

Key Qualifications:

Mr. Greiner is a Senior Cost Estimator at CSG and also serves as Operations Manager providing architectural, civil and structural construction cost and system analysis in cost control, budget monitoring, design estimating, value analysis and construction estimating.

In addition to providing cost management services including estimate preparation, Mr. Greiner is responsible for assigning the appropriate personnel for Cost Models & trade-off-cost studies and budgeting efforts for each project.

RELEVANT EXPERIENCE:

City of Savannah, GA IDIQ Estimating Contract

CSG maintained a contract with the city to provide on-call estimating services. The projects consist of interior renovations, building envelopes, roofing, and MEPF systems for a variety of historical, judicial, public safety and government administration structures.

Role: Senior Cost Estimator

DeKalb County IDIQ, DeKalb County, GA

CSG provided estimating services under an IDIQ contract for the county of DeKalb. Projects included upgrading communication systems, structural repairs and renovations of Police and Fire stations as well as other municipal buildings.

Role: Senior Cost Estimator

Hall County Public Works, Hall County, GA

Mr. Greiner prepared the Preliminary Budget for this public works facility to include offices, fleet maintenance and storage buildings for a feasibility study. The estimated construction cost was \$3.8 million.

Role: Senior Cost Estimator

United States Postal Service South Bay MPO Dock Expansion, Miami, FL

CSG prepare phased cost estimates for this dock expansion to accommodate increased international shipping activity. The scope of work included driven piles, concrete foundations and storm wall construction. The elevated dock structure included concrete deck, enclosed buildings and logistics handling equipment. The added dock square footage and civil work had an estimated construction cost of \$51 million.

Role: Senior Cost Estimator

Bay County Water Treatment Plant Operations Building, Panama City, FL

CSG prepared phased cost estimates for this 7,148 SF drinking water treatment facility that sustained substantial damage from Hurricane Michael. The renovation included new offices, updated kitchen, bunkroom and conference rooms, restrooms, lounge electrical control room and lab operations room as well as new MEP.

Role: Senior Cost Estimator

Decatur Fire Station No. 2, Decatur, GA

CSG provided cost management on this project involving the renovation and expansion of this 4,800 SF facility. The proposed design incorporates a glass feature element on the front of the facility and a re-working of the building interior layout and apparatus bays.

Role: Senior Cost Estimator



Key Qualifications:

Burt Jenkins, CPE
Senior Cost Estimator
Costing Services Group,
Inc.

Mr. Jenkins provides architectural, civil and structural construction cost and system analysis in cost control, budget monitoring, design estimating, value analysis and construction estimating.

Location:
Atlanta, GA

In addition to providing cost management services, including preparation of estimates, Cost Models, trade-off cost studies and budgeting, he is responsible for coordinating project take-off and pricing as a Senior Cost Estimator at CSG.

Years of Experience:
32 (10 with CSG, 22 with others)

RELEVANT EXPERIENCE:

Education:
Bachelor of Science
(Construction Technology),
1991
Appalachian State
University

City of Savannah, GA IDIQ Estimating Contract

CSG maintained a contract with the city to provide on-call estimating services. The projects consist of interior renovations, building envelopes, roofing, and MEPF systems for a variety of historical, judicial, public safety and government administration structures.
Role: Senior Cost Estimator

Training & Certifications:

- Certified Professional Estimator (CPE)
- NC Wetlands Recovery
- OSHA
- ASU compliance for Alternative Energy and Materials
- MSHA
- Held GC license in NC, SC & VA

DeKalb County IDIQ, DeKalb County, GA

CSG provided estimating services under an IDIQ contract for the county of DeKalb. Projects included upgrading communication systems, structural repairs and renovations of Police and Fire stations as well as other municipal buildings.
Role: Senior Cost Estimator

Navy Federal Credit Union Corporate Master Plan, Pensacola, FL

CSG led the costing efforts for a major expansion of this corporate campus. With the addition of 240 acres, 2 office buildings equaling 342,300 SF, a new central energy plant, parking deck, auditorium and recreation area, the client added space for 1,500 workers with this project. Estimated construction cost was \$200 million.
Role: Senior Cost Estimator

TVA Cybersecurity 2nd Floor Monteagle Place, Knoxville, TN

CSG prepared cost estimates for this 25,685 SF renovation project. This included a security update and office remodel with new demountable walls and ceilings and the replacement of access floors. The estimated construction cost was \$3.7 million.
Role: Senior Cost Estimator

Augusta-Richmond County Judicial Complex, Augusta, GA

CSG Prepared phased cost estimates on this 188,000 SF project. The project included a green roof system, deep foundations and a brick and limestone exterior wall finish system. The estimated construction cost was \$48 million.
Role: Senior Cost Estimator

Charleston County Library Renovations, Charleston, SC

CSG prepared phased cost estimates for multiple library renovations in Charleston. The scope of work included new conference rooms, study rooms and staff areas along with ceiling replacement and bathroom relocations. Estimated renovation costs ranged from \$1.56 to \$1.69 million.
Role: Senior Cost Estimator

Saeid Saheb
Cost Estimator
Costing Services Group,
Inc.

Location:
Atlanta, GA

Years of Experience:
31 (4 with CSG, 27 with
others)

Education:
Masters of Science
(Construction
Management), 2017
Bachelor of Science (Civil
Engineering), 1988

Key Qualifications:

Mr. Saheb has extensive experience in construction estimating, construction project management and quantity takeoffs. As a Cost Estimator at CSG, he is responsible for preparing cost estimates.

RELEVANT EXPERIENCE:

City of Savannah, GA IDIQ Estimating Contract

CSG maintained a contract with the city to provide on-call estimating services. The projects consist of interior renovations, building envelopes, roofing, and MEPF systems for a variety of historical, judicial, public safety and government administration structures.
Role: Cost Estimator

DeKalb County IDIQ, DeKalb County, GA

CSG provided estimating services under an IDIQ contract for the county of DeKalb. Projects included upgrading communication systems, structural repairs and renovations of Police and Fire stations as well as other municipal buildings.
Role: Cost Estimator

Navy Federal Credit Union Corporate Master Plan, Pensacola, FL

CSG led the costing efforts for a major expansion of this corporate campus. With the addition of 240 acres, 2 office buildings equaling 342,300 SF, a new central energy plant, parking deck, auditorium and recreation area, the client added space for 1,500 workers with this project. Estimated construction cost was \$200 million.
Role: Cost Estimator

Scott Candler Water Treatment Plant Improvements, Atlanta, GA

The estimated construction cost was \$49 million. The project consisted of demolition of the administration building, pump station, fuel tanks and proper disposal of sediment basins. The requirement of importing new fill and piping, new clear wells, pump station, extensive water piping, asphalt paving, coordinating new electrical panel boards, circuit breakers and transformers, new utilities, and total process integration.
Role: Cost Estimator

DeKalb Animal Shelter, Chamblee, GA

CSG provided cost management services for this 34,790 SF new construction project. Exterior features included cement board lap siding with PVC paw print panels. Interior features included, veterinarian equipment, dog and cat cages as well as dog runs. The estimated construction cost was \$11.4 million.
Role: Cost Estimator

Hall County Public Works, Hall County, GA

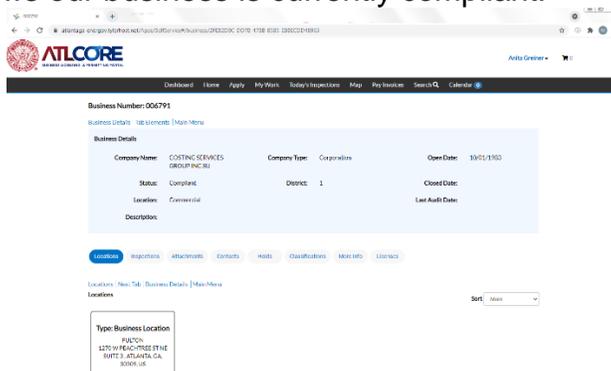
Mr. Jenkins prepared the Preliminary Budget for this public works facility to include offices, fleet maintenance and storage buildings for a feasibility study. The estimated construction cost was \$3.8 million.
Role: Cost Estimator

1.5 Vendor Profile - Business License



SAH

Note: The license above is our 2020 license. CSG’s 2021 license is in process with the City of Atlanta (and is not considered late). CSG can send when we receive it. The screenshot below shows our business is currently compliant.



The undersigned hereby declares that: Costing Services Group, 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: YES

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. YES 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: Atlanta, GA
- B. Does the responding vendor maintain a significant physical location in Lake County at which employees are located and business is regularly transacted: NO If “yes” is checked, provide supporting detail: [Click or tap here to enter text.](#)

9.0 GENERAL VENDOR INFORMATION:

Firm Name: Costing Services Group, Inc.

Street Address: 1270 W. Peachtree Street NW, Suite 3

City: Atlanta State and ZIP Code: GA 30309

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

Telephone: 404.815.9555 Fax: 404.815.9666

Federal Identification Number / TIN: 58-1528787

DUNS Number: 146423215

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: **Anita Greiner**

Date: 6/29/2021

Print Name: Anita Greiner

Title: Owner/CEO

Primary E-mail Address: anita@costingservicesgroup.com

Secondary E-mail Address: james@costingservicesgroup.com

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]

2.3 Proof of Sunbiz.org Registration



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Florida Profit Corporation
COSTING SERVICES GROUP, INC.

Filing Information

Document Number P1500002280
 FE/EIN Number 58-1528787
 Date Filed 01/07/2015
 Effective Date 01/05/2015
 State FL
 Status ACTIVE

Principal Address

1270 WEST PEACHTREE ST, NW
 SUITE 3
 ATLANTA, GA 30309

Changed: 03/11/2016

Mailing Address

1270 WEST PEACHTREE ST, NW
 SUITE 3
 ATLANTA, GA 30309

Changed: 03/11/2016

Registered Agent Name & Address

INCorp SERVICES, INC.
 17888 67TH COURT NORTH
 LOXAHATCHEE, FL 33470

Officer/Director Detail

Name & Address

Title CEO

GREINER, ANITA S
 1270 WEST PEACHTREE ST, NW, SUITE 3
 ATLANTA, GA 30309

Annual Reports

Report Year	Filed Date
2019	04/01/2019

search.sunbiz.org/Inquiry/CorporationSearch/SearchResultDetail?InquiryType=EntityName&directionType=Initial&searchNameOrder=COSTINGSERV... 1/2

5/21/2021

Detail by Entity Name

2020	01/10/2020
2021	01/04/2021

Document Images

01/04/2021 - ANNUAL REPORT	View Image In PDF format
01/10/2020 - ANNUAL REPORT	View Image In PDF format
04/01/2019 - ANNUAL REPORT	View Image In PDF format
01/02/2018 - ANNUAL REPORT	View Image In PDF format
01/05/2017 - ANNUAL REPORT	View Image In PDF format
03/11/2016 - ANNUAL REPORT	View Image In PDF format
01/07/2015 - Domestic Profit	View Image In PDF format

Request for Taxpayer Identification Number and Certification

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

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.
Costing Services Group, Inc.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only **one** of the following seven boxes.

Individual/sole proprietor or single-member LLC C Corporation S Corporation Partnership Trust/estate

Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____

Note: 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 **not** 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.

Other (see instructions) ▶ _____

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

(Applies to accounts maintained outside the U.S.)

5 Address (number, street, and apt. or suite no.) See instructions.
1270 West Peachtree St, NW, Suite 3

6 City, state, and ZIP code
Atlanta, GA 30309

7 List account number(s) here (optional)

Requester's name and address (optional)

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.

Social security number									
or									
Employer identification number									
5	8		1	5	2	8	7	8	7

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.

Sign Here Signature of U.S. person ▶ *James E. Seiner* Date ▶ *12 March 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.

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: Costing Services Group, 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: **Anita Greiner**

Date: 6/29/2021

Print Name: Anita Greiner

Title: CEO

Primary E-mail Address: anita@costingservicesgroup.com

Secondary E-mail Address: james@costingservicesgroup.com

2.6 Forms - Proof of Insurance

Proof of General Liability Insurance

- Note: Costing Services Group, Inc. will provide an original certificate of insurance reflecting coverage in accordance with the requirements of Exhibit B within five working days if requested.



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

06/23/2021

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).

PRODUCER InsuranceHub Agency, LLC 1720 Lakes Parkway Lawrenceville GA 30043		CONTACT NAME: Salima Ismail PHONE (A/C, No, Ext): (770) 497-1200 E-MAIL ADDRESS: coi@insurancehub.com		FAX (A/C, No): (770) 814-7187	
		INSURER(S) AFFORDING COVERAGE			NAIC #
		INSURER A: Nationwide Mutual Ins Co (Allied)			23787
		INSURER B: Nationwide Mutual P&C (Allied)			37877
		INSURER C:			
		INSURER D:			
		INSURER E:			
		INSURER F:			
INSURED Costing Services Group Inc 1270 W Peachtree St NW STE 3 Atlanta GA 30309-3451					

COVERAGES

CERTIFICATE NUMBER: 21-22 Master

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"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			ACP3038676636	04/14/2021	04/14/2022	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
							Additional Insured	\$
	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			ACP3038676636	04/14/2021	04/14/2022	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input checked="" type="checkbox"/> RETENTION \$ 10,000			ACPCAF3008676636	04/14/2021	04/14/2022	EACH OCCURRENCE	\$ 5,000,000
							AGGREGATE	\$ 5,000,000
								\$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below			ACPWCK3008676636	04/14/2021	04/14/2022	<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

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER**CANCELLATION**

Lake County, a Political Subdivision of the State of Florida and the P O BOX 7800 Travares FL 32788	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
---	---

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2.7 Forms – Required License – N/A

No license is required for cost estimating.

CSG's Senior Cost Estimators maintain Certified Professional Estimator (CPE) certifications.

American Society of Professional Estimators

This is to certify that

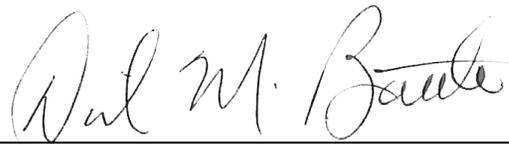
James Greiner, CPE

Having given satisfactory evidence of the necessary qualifications as required by the Certifying Body of the American Society of Professional Estimators has achieved the highest level of recognition as a

Certified Professional Estimator

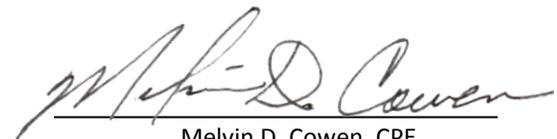
In the Discipline of

General Estimating Knowledge
1.4 General Construction



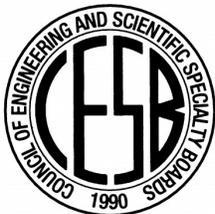
David Battle, FCPE

Certification Committee Chairman



Melvin D. Cowen, CPE

National President



CPE Number 1.4-000681-1209
CPE Original Issued on 18 December 2009
Cycle End Date 12/31/2021

American Society of Professional Estimators

This is to certify that

Burt Jenkins, CPE

Having given satisfactory evidence of the necessary qualifications as required by the Certifying Body of the American Society of Professional Estimators has achieved the highest level of recognition as a

Certified Professional Estimator

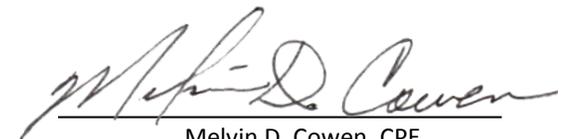
In the Discipline of

General Estimating Knowledge
1.4 General Construction



David Battle, FCPE

Certification Committee Chairman



Melvin D. Cowen, CPE

National President



CPE Number 1.4-000148-0516
CPE Original Issued on 1 May 2016
Cycle End Date 12/31/2021

2.8 Forms - Descriptive Literature

Costing Services Group, Inc. is a WBE and WOSB, recognized nationally by the WBENC (Women’s Business Enterprise National Council).

In addition, CSG is DBE certified in the state of Florida. The following image shows a screenshot of CSG’s current DBE certification with FL DOT.

From: [DBE Cert Help](#)
To: [Alan Dvoskin](#); [Anita Greiner](#)
Cc: [DBE Cert Help](#)
Subject: RE: DBE No Change Declaration - Costing Services Group
Date: Tuesday, August 04, 2020 1:26:05 PM

Good afternoon:

Your company’s certification was processed on 7/14/2020 and an acknowledgement email was sent to the email on file anita@costingservicesgroup.com. The firm’s anniversary date is 9/15/2021.

Sincerely,

Disadvantaged Business Enterprise Certification
Florida Department of Transportation
605 Suwannee Street, M.S. 65
Tallahassee, Florida 32399-0450 

PLEASE NOTE: THOUGH DBE CERTIFICATION DOES NOT EXPIRE, TO KEEP DBE STATUS, YOU NEED TO FILE A NO CHANGE DECLARATION AND COMPLETE BUSINESS TAX RETURN FORMS YEARLY; ON THE ANNIVERSARY OF YOUR CERTIFICATION.

3.1 Proposed Solution

APPROACH TO ESTIMATING

Costing Services Group uses all information available to produce a cost estimate as close to the actual project as possible. The design documents are studied to create an outline of building components that are then quantified based on specific project descriptions and historical models. Our questions to the design team and owner are to insure our understanding of the project's scope and architectural design intent. The design drawings are then used as a guide to insure that the overall cost implications of the project are understood and addressed.

Our Cost Estimate is a detailed costing report such that each building component has detailed costs assigned to the individual systems that comprise that component, described in terminology that is understood by the designers and the owner's staff. It is established as a communicating and cost control tool to assist owners and architects in the design decision process. Each line item is comprehensive and includes all the pieces that make up the total cost for that item.

In essence, CSG helps the architect, owner, and the project avoid some of the pitfalls that may compromise their success. We help the architect and owner avoid undertaking projects that do not have a compatible scope and budget. We protect the owner from costly and needless redesign efforts either as a result of over- designing or the unchallenged advice of a contractor. Our firm can also assign a cost to "scope creep" elements if it appears that these are endangering the success of the project.

Capital Construction Budgeting and Master Planning Estimates Including Life Cycle Costing and Operational Costs

COST BUDGETING & MASTER PLANNING ESTIMATES

Cost Budgeting & Master Planning services are provided to the owner at project conception to aid in establishing an accurate budget. The inclusion of a construction cost expert at this phase is often a vital first step in insuring the future success of the project.

The project program is carefully studied to determine the building functions, interior and exterior finish levels, and types of structural, mechanical and electrical systems that will be involved. Special design or scope considerations are also identified.

Once the scope of the project in terms of site work and building program are fully understood, the preparation of the conceptual construction estimate will begin. Costing

information gathered from the local market and historical cost data is incorporated into the estimate. The final conceptual estimate is then used as the established budget and cost model for the project design.

Cost planning and budgeting services give the Owner and Architect a firm understanding of project scope and cost implications. With an accurate budget and cost model in place, the project is able to successfully move forward through the design process.

LIFE CYCLE COSTING

CSG has prepared multiple lifecycle costing reports for government, commercial, and higher education projects. CSG will prepare the report in as much detail as is requested from the client ranging from simple building elements lifecycle costing to full operational, building, and energy use lifecycle costing. CSG will prepare lifecycle costing reports for multiple building system options to establish the total cost of facility ownership for each alternative.

Value Engineering Suggestions and Alternative Design Costs Analysis and Proposals

VALUE ANALYSIS / VALUE ENGINEERING

Value Analysis is an integral part of the services provided by CSG. Value Analysis (or "Trade-Off" studies) is a detailed analysis of a project or components of a project, for construction cost reduction, corrections, or optimization. The technique, in simplified terms, is that of carrying out an analysis on a component-by-component basis to study or develop alternative materials and methods that provide equivalent or acceptable results at lower costs without affecting quality level. It involves the accumulation of data and identification of problems; analysis of the data to identify areas with the greatest opportunity for cost reduction; create solutions, consider alternatives; determine best solutions and recommend action. The Value Estimator presents a palate of acceptable alternatives for the composition of each component. He/She also performs cost studies of a trade-off nature in response to the owner's needs and requests and submits to the owner a list of potential savings that will maintain the desired budget and function. The CSG team has been awarded Approval No. 88020 by the Society of American Value Engineers Certification Board to conduct Certified Value Specialist Seminars and Workshops.

Detailed cost estimated by construction division at schematic design, design development and construction document phases of design

COST CONTROL AND BUDGET MONITORING DURING DESIGN

A successful building program requires the synchronization of many elements, one of which is cost. The initial step in cost control is to establish compatibility between the building program and budget. To accomplish this, the cost estimator works closely with the architect and Owner to price each element in the program based on an established quality level. Usually the process involves sequential adjustments in all three (3) elements that establish project cost: program areas (quantity), design (quality) and cost (budget). The architect and owner draw on the cost estimator's experience and advisory capacity to relate the cost impact of these program decisions.

The cost consultant will conduct an in-depth construction market survey at this point to identify and verify unit prices and to stimulate interest in the construction community related to this project. As determined by the size and complexity of the project, a costing team is assembled to contact the project market to gather information, which bears on construction costs during the bidding and construction period of the project. Interviews are conducted with trade subcontractors, material suppliers, general contractors, the local Association of General Contractors, the local Association of Builders and Contractors, Chamber of Commerce and building trades council, using an interview form as a guide. Information is requested, as appropriate, during the organization interview regarding material and labor cost, expected changes in the same, anticipated projects that might conflict or assist during the schedule of this project, etc. The information realized from this market survey is used to prepare the Cost Model, and is shared with the architect and owner to improve their decision making process.

As a result of the program/budget compatibility effort, a project Cost Model is established which will be a tool to direct the design path. Since this Cost Model is displayed in building components, it becomes a tool for the designers in each discipline to develop their respective building elements. The narrative that accompanies the Cost Model describes and defines each of the components and becomes a guide to initiate the design process. As the design evolves, these components change and evolve within acceptable parameters and the Cost Model is fine-tuned. Therefore, if it is determined that it is in the owner's best interest to improve the exterior enclosure of the building, then an adjustment saving money must occur on the interior of the building and reflected in the modified Cost Model.

During the schematic design (SD) phase, it is important that the cost estimator and design team architect maintain constant contact to keep the project on budget. The cost estimator is available to provide cost studies and trade-off studies in response to the team's needs to bring market information to the owner's attention that might influence materials and methods choices in the design. Costing input during this phase of the

design process is critical in that the decisions made during this phase are carried through the whole project. The cost estimator's posture is to be proactive in providing these services and not wait for the design team or owner to request them but initiate contact and ensure that good costing information is provided when needed.

During design development (DD), costing services are provided that are similar to those provided during SD but the nature of the information, trade-off studies and research is more detailed. Again, continuous accessibility and input of the costing team is required to assure that budget adherence continues. Significant changes in the building cost components are only made on the approval of the owner. A quantity survey estimate is prepared at the end of design development to verify budget adherence. If variations from the budget are identified as a result of this estimate, a cost reduction/value engineering exercise occurs immediately to put the project back on its budget track. At the closure of the design development phase when the owner accepts the design as drawn and the project is within the budget, design evolution stops and working or construction documents begin. Therefore, meaningful engineering input is required during the design development phase to ascertain that these building components are fully identified for pricing and conform to the Cost Model and budget.

A detailed quantity survey estimate is prepared at the construction documents (CD) level to verify that budget compliance continues. Cost studies and cost trade-offs continue to be required throughout the construction documents phase. During this phase, it is particularly important for the cost estimator to review design information with the various trade contractors to insure that misunderstandings have not occurred or that subtleties in the design have not resulted in cost creep. If this has occurred, it must be addressed immediately with design modifications, usually with input from the construction trade involved. If the process has been adhered to faithfully up to this point, it is not anticipated that adjustments in the design would be required. At the end of the construction documents phase a 100% construction document update estimate will be prepared and the cost estimator will finalize the market stimulation effort by communicating with all qualified and interested contractors regarding the projects status and anticipated bid dates.

Construction schedule review with and without construction expenditure/cash flow projections

Construction Manager or General Contractor Bid/Guaranteed Maximum Price Analysis to Include But Not Limited Review of General Conditions, Construction Schedules and Milestones, Documents, Bidders (Prequalified, Solicited, Selected), Bid Package Preparation and Scope of Work Documentation, Unit Prices, and Bid Analysis and Recommendations

Schedule of Values Review and Analysis

CONSTRUCTION SCHEDULING & SCHEDULING REVIEW

Costing Services Group, Inc. offers construction scheduling and schedule review services from conceptual design through construction completion. The schedule is updated as necessary through all phases to match the current status and design of the project.

Projects must be properly scheduled to mitigate the possibility of construction teams running out of time and resources. Scheduling serves to ensure the correct match of labor, equipment and materials with a time line of project activities. Construction scheduling prevents project delays and obstacles that may result from poor planning. By creating schedules, workers remain well informed, better organized and more productive, which helps them reach their targeted completion goals. Moreover, construction scheduling helps construction teams stay within their allotted budgets.

As needed, Senior Estimators will review monthly draw requests and perform regular inspections, construction schedule monitoring, and change order pricing evaluation services.

Construction Scheduling services assist the client in making informed decisions concerning project feasibility, viability, and schedule. Services offered during construction ensure that the project follows established cash flow and scheduling parameters and that the Owner is delivered a successful project.

COST RECONCILIATION WITH CM/GC & BID REVIEW

Estimate reconciliation evolves during the design phases and is concerned with both scope and cost. The first step to facilitating the reconciliation process is to make sure that all estimators receive the same information and are using the same estimate format. Once the estimates have been completed, the estimators exchange estimates prior to the actual reconciliation meeting so that the estimates can be compared and differences in formatting can be resolved. Then a document is developed that outlines the differences between the estimates.

There will be differences in both scope and price among the estimates. Once those differences are identified, scope alignment is the first priority. It is important that the entire design team participates in the evaluation of the scope since the documentation is normally somewhat limited during Schematic Design and Design Development. Once the scope is consistent with design intent among all estimates, the reconciliation efforts can shift to an emphasis on pricing. Causes for differences in pricing for particular areas of the work must be identified. Some examples include differences in quality level assumption, limited competition for a particular item, “bundling” of bid packages, too much contingency in subcontractor numbers, and unfamiliarity with a product. It is the Cost Manager’s responsibility to overcome these issues so that the owner gets maximum value for their construction dollar.

Once the estimates are within tolerable range of each other, typically 2-3%, additional work may be required if the estimates are above the stated cost limitation (SCL). At this point, the activity becomes budget alignment. Again, the entire design team should participate with the estimators in the effort to brainstorm ideas to reduce cost. This list of ideas can then be priced to give the owner a list of options from which to make a decision.

As the design progresses into construction documents, the emphasis for reconciliation becomes more focused on pricing than scope, since at that point, the documents should more accurately illustrate the scope and the estimators are less reliant on assumptions. Again, the estimates should be published ahead of the reconciliation meeting so that differences can be identified ahead of time. The process then continues as it did during the previous phases until the Cost Manager and the Construction Manager agree on an estimate that is within the SCL.

Change Order Evaluation

COST-TO-COMPLETE / CHANGE ORDER EVALUATION

Though most cost analysis services are produced during the design phase to track the project cost, there are times when these services are necessary during construction. Costing Services Group provides both Cost-To-Complete Estimates and Change Order Pricing Evaluations.

In the event that a contractor is released from a project while under construction, a cost estimator may step in to determine the value of the work to complete the project. This process is simple not a matter of subtracting the total value of contractor draws from the bid price of the project. Rather, the complication of cancelled contracts, scheduling delays, deterioration of stored materials, and the prospect of new contractors having to bid on a reduced scope and take responsibility for former contractor work all make for a very difficult estimating exercise that should be handled by a construction cost expert.

Some contractors artificially inflate change order prices as a means to enhance their fees. Costing Services Group offers change order evaluation services for Architects and Owners to help discourage this practice. Change order price analysis is a good way to be sure that the client is being charged fairly for the changes that may occur during the course of construction.

Auditing and Claims Analysis

Facilities Condition Assessments with Budgetary Cost Estimates

Expert Witness Services or Testimony

QUALITY CONTROL/QUALITY ASSURANCE

CSG has a multi-tiered method for establishing and maintaining quality control during the estimating process. CSG's QA/QC procedure includes thorough review of all pricing documents to ensure all sheets are present and that there are not contradictions between drawing sheets or specifications sections. During the estimating process, CSG establishes and maintains a Request For Information (RFI) log which provides documentation for all questions and clarifications made by the estimating team to the design team. Both the independent cost estimator and the CM/GC should use the RFI log during the estimating phase to assure that all parties are receiving the same information. At the commencement of all projects at CSG, the Project Manager assembles the team members and briefs them on all aspects of the project and assigns work to each. As the take-off progresses, the Project Manager and a minimum of two other Senior Cost Estimators checks all work for errors and to confirm all scope is covered. When compiling the finish and priced estimate, the Project Manager is assisted by the QC/QA officer to confirm the pricing, including the resource used and the validity of the price based on the quantity taken off. The final step is for the QA/QC officer to review the plans and specifications once more and determine that all scope items have been covered and that the estimate represents an accurate cost for the project type and size.

BUILDING INSPECTION & EVALUATION

Building Inspection and Evaluation services are performed by the cost estimator to determine the current condition of a building and its site along with the cost to repair, renovate, or complete the project.

The first task in providing this service is to have the cost estimator conduct a site inspection. This will provide valuable information and give a first-hand account of the level of damage, incompleteness of construction, or to what extent the space needs to

be renovated. The current conditions of the structural, mechanical, and electrical systems are evaluated along with such issues as contractor staging, site access, or other possible construction constraints. Once complete, the information gathered from the site inspection is assembled to produce a report that will detail these findings.

This detailed report may also be the basis for the cost analysis of the project. Estimates will be produced to determine the cost of work recommended and can be generated in a format best suited to address the project's needs. Estimates may also be produced to reflect different project phases if this is desired.

Building inspection and evaluation are services that provide the Owner and Architect with valuable information concerning the current condition of the project as well as the anticipated cost of the repair, renovation, or cost-to-complete.

EXPERT WITNESS

CSG has been an expert witness in over 90 cases including cases involving expert witness testimony in Georgia, Florida, Tennessee, Texas, Alabama and New York. Some past cases include: alleged design deficiencies by the structural engineer prior to construction, design deficiencies in the HVAC system and contractor errors where CSG created a cost-to-repair estimate(s) to show the actual costs associated with repairing/rebuilding areas of the project damaged by the contractor. All Senior Cost Estimators at CSG are Certified Professional Estimators (CPEs) and are qualified to provide expert witness testimony during litigation/arbitration/mediation proceedings.

Cost Estimating Associated with Disaster Related Facilities Damages

BUILDING ASSESSMENT & COST-TO-REPAIR ANALYSIS

CSG has experience in estimating disaster related facilities damages, particularly hurricane damage in the state of Florida. CSG has experience focusing specifically on creating cost-to-repair estimates to show the actual costs associated with repairing/rebuilding areas of the project that were damaged by natural disasters versus demolition. CSG's senior cost estimators have performed visual on-site assessments for buildings, providing documentation and quantity surveys of the necessary repairs to provide the owner a complete understanding of the damages and a road map to repair the facility.

4.1 Subcontractors/Joint Ventures

CSG has no contracts with subcontractors nor does it have any joint ventures. CSG will perform all work associated with this contract in-house.

Costing Services Group, 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		
2	Facilities Condition Manager		
3	Auditor Claims Analyst		
4	Scheduler		
5	Chief Estimator (Architectural / Structural Civil)		
6	Senior Estimator (Mechanical/ Electrical)	Cost Estimating, QC	\$125.00
7	Estimator	Quantity Take-Off, Market Research	\$75.00
8	Administrator		

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.

5.2 Pricing Sheet – Supporting Documentation

Costing Services Group, Inc. prepares proposals for work in the requested format (Lump Sum or Hourly-Not-To-Exceed) based on provided documentation, conversations with the client, our understanding of scope and our required deliverables. CSG utilizes a simple one-page proposal format to streamline the proposal preparation process.

6.1 Financial Stability

Financial Capital

Costing Services Group, Inc. is prepared to supply a financial statement upon request and can provide a certified audit of the last available fiscal year if requested.

Human Capital

CSG workload varies by season and CSG is currently operating at 35% capacity. CSG projects workload to remain steady, allowing for adequate capacity to take on additional work.

CSG is a deadline-driven firm that responds immediately to estimating requests and client needs. Our estimating team can manage multiple projects individually to allow for schedule overlaps. All estimates are reviewed by a minimum of (2) Senior Cost Estimators prior to delivery to the client. This provides continuity and flexibility for the estimating team to handle any additional work requests or requirements. CSG prides itself on beating or meeting deadlines 100% of the time.

7.1 Litigation

29 June 2021

Costing Services Group, Inc. has no pending litigation nor any previous litigation during the past 3 years.

Anita S. Greiner, CEO

A handwritten signature in blue ink that reads "Anita S. Greiner". The signature is written in a cursive style.