



PROJECT ADVOCATES



REQUEST FOR PROPOSAL #23055 FOR:
City of Independence, MO
Various Facility Projects

6.27.2023

Your Project.
Our Passion.

Radd@project-advocates.com
www.project-advocates.com

5821 W. 137th Street | Overland Park, KS 66223 | 913.522.0080

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"I am grateful for Project Advocates putting this project together and leading the charge. Time and time again, Project Advocates demonstrates why their work is so valuable to the process. We appreciate their partnership."

*- Tim Carmody
Chief of Police, Council Bluffs Police Department*



COMPLETED COVER SHEET



INDEPENDENCE ★ MISSOURI ★

Procurement Division
111 E Maple, PO Box 1019
Independence, MO 64051-0519

REQUEST FOR PROPOSAL #23055
Owner's Representative Services for Facilities Design & Construction

ATTENTION PROPOSER – COMPLETE AND RETURN WITH SUBMITTAL

Proposing Firm Project Advocates, LLC Phone Number (913) 522-0080
(Please print or type)

Address 5821 W. 137th St. City Overland Park State KS Zip 66223

Name of Authorized Agent Radd C. Way Email Radd@Project-Advocates.com

The only authorized source for Request for Proposal (RFP) forms, addenda, and information regarding this RFP is www.publicpurchase.com. Using RFP forms, addenda, and information not obtained from www.publicpurchase.com creates the risk of not receiving necessary information about the RFP that may eliminate your proposal from consideration.

Submit questions regarding this RFP online at www.publicpurchase.com by deadline in the RFP schedule.

Proposals shall be submitted online via www.publicpurchase.com by the date and time indicated. Paper, fax, or email responses will NOT be accepted and will not be returned to sender. Proposals are sealed in a virtual lockbox that can only be opened after the Request for Proposal (RFP) closing date and time, to maintain confidentiality of the proposal. All proposals are subject to the terms and conditions herein.

Submission of qualifications is not revocable within 120 days after response deadline.



LETTER OF INTENT/INTRODUCTION FROM PROPOSER

June 27, 2023

Selection Team
City of Independence, Missouri
111 E Maple, PO Box 1019
Independence, MO 64051

RE: Response to RFP #23055 for Owner's Representative Services
City of Independence Various Facilities Projects

Selection and Project Team,

Project Advocates exists to ensure our clients achieve their project objectives. Our core business is to provide high-level project management on behalf of the City of Independence. We effectively manage projects by implementing disciplined project management controls designed to identify the critical project objectives, evaluate options, establish accountability, and monitor progress, all through an open and collaborative environment. We are able to be your **trusted advisor** because of our local presence and knowledge, experienced and competent staff, and company's strong values.

We are immediately available and have the full capacity to begin services on your exciting projects. We promise to lead, organize, inform, and motivate the collective team to allow for the efficient implementation of your various facilities projects including City Hall and multiple fire stations to meet City of Independence, your stakeholders, and the community's objectives.

Project Advocates delivers on this promise by providing:

- **Commitment** of Radd Way as your Project Lead, Jennifer Gerlach, and our Principal owners and Advocates to be highly involved for the overall Program Management and community engagement necessary to successfully manage all processes.
- **Local, experienced and competent staff** with Project Management experience on similar projects and excellent communication and relationship building skills.
- Strong and effective **programming analysis, constructibility, efficiencies, building ratios and systems, and critical building elements** initially and throughout all services.
- Ability to provide **complete, independent, and unbiased** in-house planning and preconstruction services through procurements, design management, conceptual and detailed cost estimates, best value options, scheduling, and team communications.
- **Effective use of technology** and decision-making platforms to communicate and manage the overall project collaboratively through the City's Virtual Project Manager program.

We look forward to meeting with the City of Independence Project Team and discussing how **Project Advocates** can deliver the array of services needed to make your City Hall and multiple fire station projects a success.

Sincerely,



Radd C. Way
Principal/Project Advocate
Radd@project-advocates.com
(913) 522-0080



Jennifer Gerlach, PE
Project Advocate
Jennifer@project-advocates.com
(913) 201-8592



NOTARIZED AFFIDAVIT

Owner's Representative Services for Facilities Design & Construction - #23055 AFFIDAVIT

STATE OF Kansas)
COUNTY OF Johnson)

SS.

Project Advocates, LLC of the City of Overland Park
, County of Johnson , State of Kansas ,

being duly sworn on her or his oath, deposes and says:

1. That I am the Principal and Owner (Title of Affiant) of
Project Advocates, LLC (Name of Proposer) and

have been authorized by said proposer to make this affidavit on the proposer's behalf;

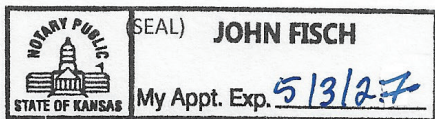
- 2. No Councilmember, City Manager, Director of Finance and Administration, City Procurement Manager, or any City employee is financially interested in what the proposer is offering to sell to the City pursuant to this RFP, nor is the proposer a City employee or board member whose proposal creates a conflict of interest. A conflict of interest would arise if any person named in this section is in a position to affect either the decision to solicit proposals or the selection of the successful proposer;
- 3. Proposer has not participated in collusion or committed any act in restraint of trade, directly or indirectly, which bears upon anyone's response or lack of response to this RFP; and
- 4. Proposer is responsible for submitting with his or her proposal a record of any discussion with a Councilmember, City Manager, Director of Finance and Administration, City Procurement Manager, or any other City employee regarding this RFP; and
- 5. The authorized signer of this document certifies that the organization and each of its principals are not suspended or debarred by the City of Independence, State of Missouri or Federal government.

Project Advocates, LLC (Name of Proposer)

By: [Signature] (Signature of Affiant)

Principal and Owner (Title of Affiant)

Subscribed and sworn to before me this 20 day of June, 2023



My commission expires: 5/13/27

NOTARY PUBLIC in and for the County of Johnson

State of Kansas



FIRM EXPERIENCE AND DESCRIPTION

COMPANY OWNERSHIP

Project Advocates is a small business enterprise. The company was founded in 2010, opened a Kansas City area operation in Overland Park, KS in 2016, North Texas in 2017 and Phoenix, AZ in 2021. The company's Principals have more than 180 years experience in the commercial construction industry and over 17 years in the metro-Kansas City area.

COMPANY PROFILE SERVICES

Project Advocates offers project management expertise to the City of Independence as required to meet your project needs.

WHO WE ARE

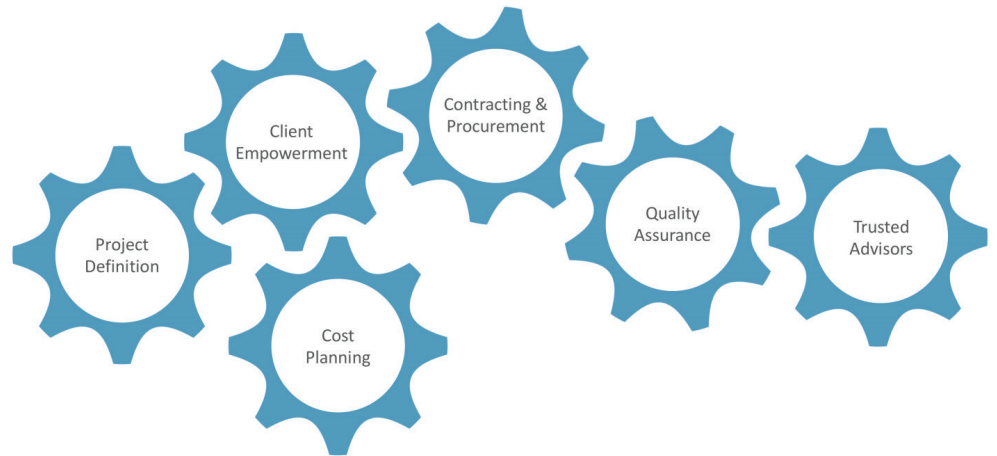
We are inspired, determined, and highly-motivated estimators, engineers, managers, and construction professionals that have united with purpose; to provide Concept-to-Completion Program, Design and Construction Project Management Services that save more than they cost. We are trusted advisors committed to achieving the City of Independence project objectives.

WHAT WE DO

Our passion and experience bring ideas to life. We work to help your Project Team define and communicate project objectives using detailed cost and programming analysis. We help assemble and lead teams to achieve your validated project objectives by providing realistic information in formats that are easy to understand. Conceptual/detailed cost planning with a procurement strategy in sync with the project objectives brings cost and schedule certainty to every project.

VISION ———> COMMUNICATIONS ———> EXECUTION ———> LEGACY

Project Advocates partners with organizations that understand the power of the collaboration. Through the intelligent use of technology and working in a trust-filled environment, waste is driven from the design and build processes enhancing value. **Our approach advances the objectives of the City of Independence.**



Rob Putthoff

Radd Way

Jennifer Gerlach



John Taylor

“With a few minor changes that improved the facilities constructability and serviceability, Project Advocates was able to contract the work to a reputable builder 25% less than the previous estimates making the project possible.”

*- Bob Schlott
Warren Distribution*



LIST OF CLIENTS

Since 2010, [Project Advocates](#) has provided Owner's Representation and construction advisory services for a wide variety of public, municipal buildings, fire stations, police departments, community centers, facilities project types, sizes, and clients throughout the Midwest. The following is a listing, broken down by Public and Private, as requested. Please note that more than 70% of our projects utilized a CM @ Risk delivery method and the amount of repeat clients, we establish strong and long term relationships by performing beyond everyone's expectations.

Project Name & Description ** Project with prior company	Public or Private	Services/ Constr. Date	\$ Value	Architect/ Contractor	Project Advocates Staff	Client Representative
City of Shawnee Fire Station 73 and Fire Station 71 Additions and Renovations	Public Serves 66,000 pop.	2021 - 2024	\$26.2 mil	GLMV Turner Construction	Radd Way Jennifer Gerlach John Taylor Rick Kmiecek	City Engineer Loren Snyder City Manager Doug Gerber
POAH Hawthorne Village Residential Renovations and Community Building Independence, MO	Private	2021 - 2023	\$28 mil	Rosemann Assoc. Roanoke	Radd Way Rob Putthoff	Josh Barrett Scott Dumont
Clay County: - NW 48 th St. Annex. 32,000 sf 2-story Administrative Facility - No. Brighton Annex, 60,000 sf Admin Building - Parks Office, Nature Center, Astrology Independence, MO	Public Serves 220,000 pop.	2020 - 2022 Precon Only	\$12 mil \$18 mil \$6 mil	WSKF/McClure TBD WSKF Bibb Architects TBD	Radd Way John Taylor Rob Putthoff Rick Kmiecek	Gene Owen (Retired) John Davis
Council Bluffs New Police Headquarters. 55,000 sf 2-story facility & vehicle building	Public Serves 62,400 pop.	2017 - 2020	\$20 mil	Hoefer Wysocki Architects Sampson	Radd Way John Taylor Phil Miller Jackson Taylor	Police Chief Tim Carmody
Smith County, TX Courthouse 263,000 sf 8-story Fully Finished with 12 Courtrooms & Public Services	Public Serves 233,000 pop.	2019 - 2026	\$140 mil	Fitzpatrick Architects TBD	Phil Miller John Taylor Radd Way	Judge Nathaniel Moran
City of Olathe Downtown Library** New 47,700 SF Library with Community Gathering Spaces	Public Serves 145,000 pop.	2019 - 2022	\$25 mil	DLR/Gould Evans McCownGordon	Jennifer Gerlach	Susan Sherman
City of Anna, TX Community/ Recreation Center, & Public Library 32,500 sf	Public Serves 27,376 pop.	2023 - 2025	\$22 mil	BRW/720 Design TBD	Phil Miller Alma Zamora	Interim City Manager Ryan Henderson
Merriam Community Center** New 66,000 SF Community and Indoor/Outdoor Aquatics Center	Public Serves 12,000 pop.	2017 - 2020	\$30 mil	Clark Enerson McCarthy Building Co.	Jennifer Gerlach	Mary Hauck
Pottawatomie County Arts, Culture, & Entertainment	Public Serves 93,667 pop.	2022 - 2024	\$27 mil	PA TBD	John Taylor Matt Herzog Rick Kmiecek	Dana Kehm
City of Shawnee: -Town 1929 Chapel Replication -Visitors Center Replacement -Police Expansion	Public Serves 66,000 pop.	2021 - 2023 Precon Only	Various	Various TBD	Radd Way Jackson Taylor John Taylor Jennifer Gerlach	Charlie Putler Tonya Lecuru Police Chief Jim Baker
City of Shawnee Community and Aquatics Center. 67,700 sf Recreation, Fieldhouse, Fitness, Educational, and Public Facility	Public Serves 66,000 pop.	2018 - 2019 Precon Only	\$38 mil	Perkins + Will/ Clark Enersen JE Dunn	Radd Way John Taylor Ray Whitmore Rick Kmiecek	Loren Snyder
Johnson County: ** - Historical Museum - Criminalistics Laboratory - Mental Health & Maint. Bldg - NE Offices - Justice Annex	Public Serves 602,400 pop.	2015 Prep 2013 2015 2013 2013	\$3 mil \$22.7 mil \$1.1 mil \$4.2 mil \$5.4 mil	All Weitz Co. el Dorado PGAV JoCo 360 Architects el Dorado	Radd Way	Joe Waters Chad Foster



LIST OF CLIENTS (Continued)

Project Name & Description ** Project with prior company	Public or Private	Services/ Constr. Date	\$ Value	Architect/ Contractor	Project Advocates Staff	Client Representative
Westside Community Schools: - Bond I Master plan, phase I - Bond II, 15-year master plan & scope implementation - Reno./Adds to 6 Schools - Community Pool Facility - Transitional School - Oakdale Elementary - Middle School - Sunset Hills Elementary - Swanson Elementary - HS Shop Expansion Prairie Lane Elementary	Public Serves 6,000 Students	2015 - 2020	\$79.9 mil \$150 mil \$14.3 mil \$16.2 mil \$13 mil \$13 mil \$12 mil	DLR Group, Var. DLR Group, Var. Various DLR Group, Lund Ross DLR Group, Lueder BVH, Key TACK, Lund Ross APMA, Vrana	John Taylor Rob Zimmerman Ray Whitmore Matt Herzog Jackson Taylor	Mike Lucas
College of St. Mary: - Mercy Hall renovation - Fitness & Wellness Center - Lozier Ph I & II Showers - Softball renovation, East Parking Lot expansion - Lied Arena AC Cadaver Lab	Private Serves 1,000 Students	2013 - 2017	\$5.3 mil \$18 mil \$1 mil \$1.2 mil \$500,000 \$2 mil	Leo A Daly, Weitz PA PA RDH Leo A. Daly	John Taylor Matt Herzog Jackson Taylor Ray Whitmore Jackson Taylor	Sister Maryanne Stevens
Creighton University: - CL Werner Center - School of Dentistry - HVAC Renovation Program - Hieder Hall Renovation - Retreat Cntr Improvements - Jesuit Housing feasibility - Library/Media - Public Safety relocation - Creighton Hall FA - Medical Education - Law School - Old Gym renovation - Brandies renovation - Animal Science Center	Private Serves 8,700 Students	2021 - 2023 2017 - 2018 2015 - 2018 2015 - 2017 2015 - 2017 2017 2017 2017 2017 2016 - 2017	\$90 mil \$85 mil \$15 mil \$25 mil \$1 mil \$10 mil \$12 mil \$5 mil \$750,000 \$8 mil \$4 mil \$3 mil \$3 mil \$1.6 mil	Various RDG Alvine Creighton Creighton Creighton Leo A Daly Creighton Alvine Creighton Alvine Creighton Sinclair Creighton Creighton	John Taylor Rob Zimmerman Matt Herzog Rick Kmiczek Ray Whitmore Bonnie De Smet-Bacon Jackson Taylor	Derek Scott
UMKC:** - Miller Nichols Learning Center - Student Success Center - Durwood Soccer Stadium - Dental School Renovations - Locker Room Renovations	Public. Serves 16,000 Students	2013 2013 2009 2008 2013	\$15.4 mil \$6.6 mil \$7.4 mil \$1 mil \$.6 mil	All Weitz PGAV Gould Evans DLR Group Gould Evans PGAV	Radd Way	Robert Simmons



LIST OF CLIENTS (Continued)

Project Spotlights:

City of Shawnee Fire Station 71 Addition and Renovations. Shawnee, KS

CM @ Risk Delivery Approach

\$19.2 million 39,000 sf addition and complete renovations to this facility located at 65th & Quivira in Shawnee, KS. Early involvement with construction team selection, budget/schedule reviews, and then full Owner's representation services from the start of Schematic Design. The delivery method is CM at Risk with a projected completion in the summer of 2024.



A1) SCHEME A - OVERALL FIRST FLOOR PLAN

City of Shawnee Fire Station 73 Addition and Renovations. Shawnee, KS

CM @ Risk Delivery Approach

\$7.3 million 15,000 sf addition and complete renovations to this facility located at 68th & Hedge Lane Terrace. In conjunction with FS71, the same project team are providing full services with a late 2022 start of construction and Spring 2024 completion.



F1) PERSPECTIVE 01

References:

Loren Snyder
City Engineer
City of Shawnee
lsnyder@cityofshawnee.org
(913) 742-6229

Architect:

GLMV/FGMA

Construction Manager at Risk:

Turner Construction Company

Other Executive Committee Members:

Doug Gerber, City Manager
Caitlin Gard, Assistant City Manager
Brian Dailey, Facilities Manager
Chief Rick Potter, Fire Chief
Deputy Chief David Wolff, Battalion Chief
Doug Whitacre, Public Works Director
Kevin Manning, Deputy Public Works
Mel Bunting, Director Information Technology



D.I.A.

LIST OF CLIENTS (Continued)

Council Bluffs Police Headquarters. Council Bluffs, IA

Design-Bid-Build Delivery Approach

55,000 sf 2-story walk-out facility with a separate vehicle building. Programming includes office, community center, criminalistics laboratory, weapon & ammunitions storage, crime property inventories, and interrogation/interview/detection rooms.

Projects advocates provided full Owners Representation and Trusted Advisory services from project concept through final completion.



References:

Client:

Tim Carmody
Chief of Police
Council Bluffs Police Department
tjcarmody@councilbluffs-ia.gov
(712) 328-4940

Captains:

Terry LeMaster - Services
Scott Milner - Administration
Todd Weddum - Criminal Investigations
Greg Schultz - Uniform Division

City Staff:

Wendy Schultz - Chief of Staff
Kim Riebe - Purchasing
Mark Howard - CIO
Rick Reichenberg - Facilities

Architect:

Hoefler Wysocki

General Contractor:

Sampson Construction

Clay County No. Brighton Annex. Kansas City, MO

Design-Bid-Build Delivery Approach

60,000 sf 3-story facility to house County administrative services, community events, educational opportunities, and a future courtroom. The project started construction only 7 months after the site was selected and the team released but eventually stopped due to political priorities.



References:

Client:

Gene Owen
County Commissioner (Retired)
Clay County
gowen@kc.rr.com
(816) 365-7815

Architect:

WSKF Architects

General Contractor:

StructSure Projects



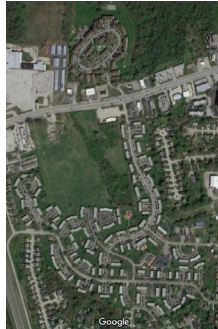
D.I.A

LIST OF CLIENTS (Continued)

Hawthorne Place Apartment Renovations Independence, MO

CM @ Risk Delivery Approach

129 building, 725 apartment unit rolling renovation of occupied residential units over an 18-month construction timeline. Residents pack-up and move out of one building commencing a flurry of construction activities over a 9 – 12 day period to complete interior and exterior selective remodeling. The scope also includes a Community building addition & renovation, site amenities, and extensive site civil upgrades. Although not a commercial or municipal type project, the planning, logistics, relocations, communications, quality, safety, and plan implementation are phenomenal. Construction is projected to complete late summer 2023 with a ribbon cutting in October.



AERIAL SITE PLAN



References:

Client:

Scott Dumont
Project Manager
Preservation of Affordable Housing
WayPoint KLA
scottdumont@waypointkla.com
(617) 270-4324

Architect:

Rosmann Associates

Construction Manager at Risk:

Roanoke Construction Company

“They have assisted the team in budgeting, value engineering, design management, and procurement. They strike a nice balance in providing owner representative services by advocating for the success of all in a very straightforward and direct manner. They specifically look for common ground in resolving issues and are timely in their responses allowing us to work toward agreed upon schedule milestones

*– Scott Thompson
President, Lund Ross Construction*



D.I.B

REFERENCES

Caitlin Gard
Deputy City Manager
City of Shawnee, Kansas
11110 Johnson Drive
Shawnee, KS 66203
(913) 742-6230
cgard@cityofshawnee.org

Loren Snyder
City Engineer
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(913)742-6229
Lsnyder@cityofshawnee.org

Susan Sherman
Deputy City Manager
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SSherman@olatheks.org

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Council Bluffs Police Department
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(712) 328-4940
tjcarmody@councilbluffs-ia.gov

Reinhard Mabry
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rmabry@alphapointe.org

Rick Potter
Fire Chief
Shawnee Fire Department
6501 Quivira Rd
Shawnee, KS 66227
(913) 742-6100
rpotter@cityofshawnee.org

Scott Dumont
Project Executive
Waypoint KLA
42 Raymond St.
Manchester, MA 01944
(617) 270-4324
scottdumont@waypointkla.com



ABILITY TO PERFORM

Project Advocates has a unique system for today's industry. As your Trusted Advisor, we maintain a very open, collaborative, and transparent approach to services and relationships throughout the process.

The City of Independence has undertaken an aggressive program to improve the life safety, City management, and the overall community for its citizens. **Project Advocates** proposes to continue the successful assessment, prioritizing, and planning for these projects by providing our diverse and all-encompassing services. The City of Independence has effectively detailed the scope of services in Section 2 of the RFP.

In addition to providing standardized technical and management expertise on each development phase of your city facility projects, we will:

- Continue to be a **Trusted Advisor** to Independence
- Provide **Program Management** continuity from the start through building Occupancy, Operations & Maintenance
- Ensure Independence achieves the overall **program objectives**
- Provide **stewardship of the funding** approved by the community
- **Optimize value** of the program to improve safety, security, functionality, and infrastructure within and around the new facilities
- Strong and effective **programming analysis, constructibility, efficiencies, building ratios and systems, and critical building elements** initially and throughout all services.
- **Engage all stakeholders** involved
- **Exceed expectations**

Our staff is available and ready to begin Advisor work immediately. All of our proposed staff members (see section D.4) are committed to completing all services within the anticipated time frame determined. Services include:

Functional Programming

- Project Charter to define and establish
 - Overall Project goals
 - Team collaboration goals
 - Team member roles & responsibilities
- System functional programming and standards
 - Security
 - Building Management and Controls Systems
 - Maintenance
- General design standards
 - Communications systems and approaches
 - Schedule milestones
 - Budget targets

Communications

Our real-time transparent approach will keep all team members informed of as many detailed or high level summarized communications wanted or needed through the City's Vendor Self Service portal and other City designated platforms. Communications are then vetted and publisized to the general public and all stakeholders to insure effective updating, documentation, and input as warranted. This is delivered by:

- Establishing a **project team** site with login, passwords, and security clearances as needed. Additional team members are added as they come on-board
- This site will include:
 - Overall project timeline
 - Project Notebook
 - Project Updates section
 - Project Calendar
 - Quick Links
 - Project Documents

Project Advocates' transparent approach to effective web based communications provides 24/7/365 access for all appropriate team members and stakeholders. Information can then be tied to other



ABILITY TO PERFORM (Continued)

websites with only the information agreed to share externally. Our approach insures effective collaboration and documentation.

Programming

- Sustainability/Recycling/Energy Efficiencies
- Building Envelope/Daylighting
- Furniture, Fixtures, and Equipment
- Energy modeling and optimization
- Traffic studies
- Estimated Conceptual cost and cash flow projections
- Project packaging and logistics with overall program schedule management
- Build Team procurement. Processes to select the best Build team for the services required

Planning and Design Management

Project Advocates has the experience and expertise to offer sophisticated, state of the art planning and design management services. The value of providing accurate programming, cost and constructability input during design is often times the best investment that can be made during the design and decision making process. **Project Advocates** provides this value without the unintended consequences of incongruent objectives. As a result, Contractors and other Trade Contractors can be hired using competitive criteria after the project is sufficiently defined.

- Design management (design criteria, schematic, design development, and construction documents)
- Detailed cost estimating - Our experienced staff provides detailed estimating services incorporating local market pricing. This provides the City of Independence with a truly independent, third party estimate that can be used as a baseline for the contract negotiations process
- Detailed Project scheduling
- Design decision-making platform - We plan to use a decision making platform to guide the teams through the process: Choosing by Advantages. This platform provides the tools and transparency to deliver sound decisions
- Community engagement - We will ensure that stakeholders are informed and engaged in the design process and use an appropriate level of communication with the Community
- Constructability reviews
- Site logistics planning
- Coordination with involved parties
- Procurement strategies - We will advise the City of Independence and Stakeholders on the advantages of each procurement method for every individual scope involved in the project

Other services included in **Project Advocates** approach include:

- Construction Administration
- Project Monitoring
- Design and Cost Control
- Owner Occupancy and Move-in Coordination
- Operations & Maintenance Training
- As-builts and Warranty Documentation

We look forward to discussing our services and the best value fee approach with the City in greater detail.



D.3 PROJECT DELIVERY

“WaypointKLA has provided Project Management services for the Preservation of Affordable Housing (POAH) on a variety of renovation and ground-up low income housing projects across the country. We partnered with Project Advocates to be our local Kansas City area On-Site Project Manager and our eyes and ears throughout the preconstruction and construction processes in Independence, MO. Their insight, experience, and proven processes helped insure the project was a success in scope, schedule, quality, and budget. We have and will continue to work with them on other projects in the Midwest.”

– Scott Dumont – Senior Project Manager, WaypointKLA

“We have had the good fortune to build a relationship with Project Advocates over the past several years and they have become our ‘go to’ on any facility questions or improvements that we are planning.

With Project Advocates by our side, they have brought cost certainty and practical solutions to every project. Having someone in the room representing the club’s interest has really helped us make sure we get the most bang for the buck for our supporters and the kids we serve. Their extensive construction background helped us ask the right questions, and in several cases save us money.

I strongly recommend Project Advocates enthusiastically and without reservation.”

– Tom Kunkel – Chief Operations Officer, Boys & Girls Club of the Midlands

“Thank you again for putting this together and leading the charge. Time and again you and Project Advocates demonstrate why your work is so valuable to the process. We appreciate your partnership.”

– Tim Carmody – Chief of Police, Council Bluffs Police Department

“As a direct result of Project Advocates efforts and the information provided, we were able to save substantial project costs that have well exceeded our expectations. They possess exemplary people skills, very collaborative, and work very well independently.”

– Lorne Hurov, Vice President, Corporate Real Estate & Facilities, TD Ameritrade

“Their team provided leadership, management, and monitored all aspects on this extraordinary large and complex project. We could not be more pleased with the working relationship established as a result of their collaborative team efforts.”

– Ken Cook, President, East Campus Realty

“I wish I had Project Advocates 20 years ago when I first started! They have been great to work with and could not have done the Grand Lodge without them.”

– Jolene Roberts, President & CEO, Hillcrest Health Services

“Project Advocate’s experience was vital in helping us to achieve the project on budget, in time, and to the quality level we were looking for. We have recommended their team and will continue to do so.”

– Mike Hornacek, Executive Director, Together, Inc.

“Project Advocates brings a common sense approach to all solutions and improve the decision-making allowing for the project to move much smoother than would be possible without their involvement.”

– Charles Vrana, Vrana Construction



D.3 PROJECT DELIVERY (Continued)

“They have assisted the team in budgeting, value engineering, design management, and procurement. They strike a nice balance in providing owner representative services by advocating for the success of all in a very straightforward and direct manner. They specifically look for common ground in resolving issues and are timely in their responses allowing us to work toward agreed upon schedule milestones

I consider our relationship with Project Advocates to be strong because it is based on mutual respect and trust. We know that we will be treated fairly while being held accountable to the highest standards.”

– Scott Thompson, President, Lund Ross Construction

“Their thorough understanding of all areas of construction, ability to set and manage multiple budgets, along with managing complex schedules made them an invaluable asset to our group. They are team oriented with excellent communication and organizational skills, and has the ability to work with people at all levels. They had a great rapport with our Architects and Engineers, operation staff, contractors, and end-users.”

– Ken Hansen, Facilities Management, UNMC

“The project stayed close to our original timeline and budget. I am not overstating it when I say we simply could not have done it without Project Advocates.”

– Roberta Wilhelm, Executive Director, Girls Inc



D.3 PROJECT DELIVERY (Continued)

Documented Savings:

Prairie Village Corinth Quarter:

- Managed \$200,000 of Owner & Tenant driven changes
- Generated \$40,000 of value driven changes
- Negotiated or rejected \$115,000 of contractor requested changes
- Final negotiations with the architect and contractor netted \$75,000 of savings.

City of Shawnee FS71 & FS73:

- Managed approved budget \$1 mil overage gap down to \$0 budget gap
- Significant soft cost and FF&E management
- At FS71, meet continued occupancy throughout construction
- Disciplined design and cost control to meet an approved budget set 1-1/2 years ago.

Council Bluffs New Police Headquarters:

- Architect contract scope and negotiations – saved \$450,000
- Target design & engineering alternatives – saved \$675,000
- Contractor competitive bid process - \$2.5 million under project budget target
- Construction started where projected almost 2 years ago
- Completion schedule 2 months sooner than targeted

St. Andrews Community & Education Center:

- Phase II project schedule reduced from 18 months to 11 months, 40% reduction
- 26% cost reduction from original GMP
- Problem-solving expertise to maintain program & quality

Central High School Library & Arts Addition:

- Subcontractor solicitation & bid analysis saved 3.5% of construction costs
- Value Analysis cost options saved \$850,000
- Met aggressive schedule parameters

Hillcrest Health Services:

- Design firm award process placed emphasis on objectives and values vs fee only selection
- Preconstruction services and design team management resulted in setting a GMP 10% less than schematic estimate
- Claim settlement with no legal cost - \$1 million saved
- Change orders less than 1% vs industry standard of 4% - \$1 million saved
- Net savings of 12-15% of final construction costs

Together, Inc.:

- Scope modifications saved 15% of construction cost without change of project program
- Final costs 27% below contractor's initial GMP
- Project opened 1 month ahead of targeted schedule

Creighton University – Ahmanson Law School:

- Provided a holistic approach to simplify a very complicated and difficult project - saving approximately \$350,000 in professional and management fees that would have otherwise been required
- Minimized student and faculty disruption while also accommodating Creighton's annual budget constraints
- Used creative procurement strategies to combat a "sellers" market in the contracting community that resulted in saving over \$100,000 against conventional methods
- Completed work six weeks faster than proposed by the trade contractors using collaborative management and LEAN processes
- Reduced cost by over \$200,000 by evaluating design, facility and contractor concerns prior to award
- Traditional Design/GC approach: saved 8-10%
- Value Engineering savings to date: \$200,000
- Production savings to date: \$300,000
- Savings over cost of services: \$850,000



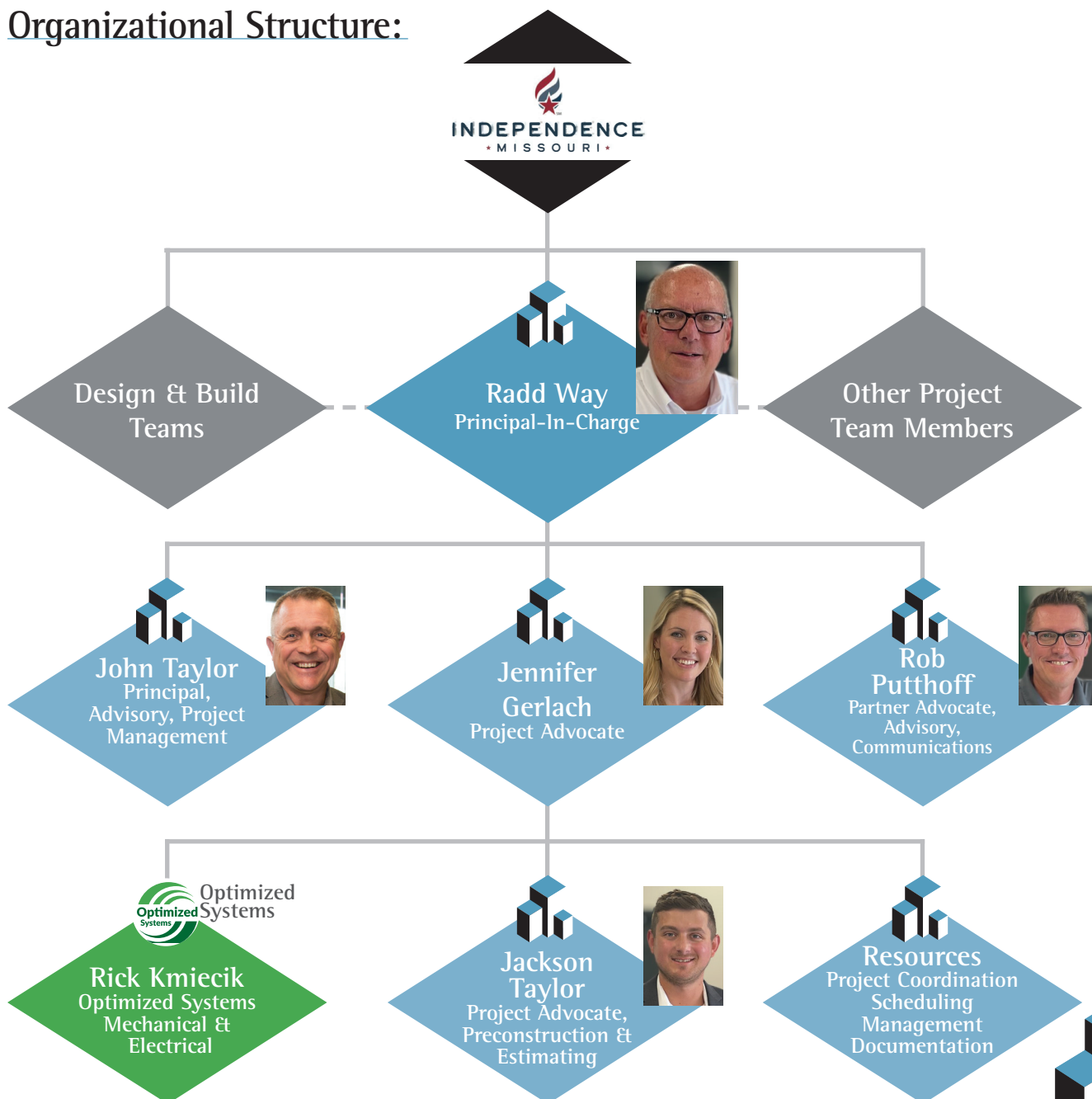
PERSONNEL

Please see the following:

Organizational Structure & Resumes:

- Radd Way: Principal-in-Charge, PROJECT LEAD
- Jennifer Gerlach: Project Advocate
- John Taylor: Founder, Principal, Advisory
- Rob Putthoff: Partner Advocate
- Jackson Taylor: Project Advocate, Preconstruction & Estimating
- Rick Kmiecik: **Optimized Systems**, Mechanical & Electrical Specialists

Organizational Structure:



Radd C. Way

EMAIL AND TELEPHONE NUMBER:

radd@project-advocates.com (913) 522-0080

PROJECT ASSIGNMENT:

Principal-In-Charge, PROJECT LEAD

YEARS' EXPERIENCE:

With the firm – 7 yrs With other firms – 33 yrs

EDUCATION:

B.S. Construction Management, University of Nebraska - Lincoln (1982)

B.S. Civil Engineering, University of Nebraska - Lincoln (1983)

ACTIVE REGISTRATION:

OSHA 30-hour (2016), EIT (1983), First Aid & CPR

OTHER EXPERIENCE AND QUALIFICATIONS RELEVANT TO THE PROPOSED PROJECT:

17-year Johnson County Resident and Office Tenant

Extensive metro-Kansas City area construction experience.

Extensive public, community, fire stations, and City facilities: Prairie Life Fitness Centers, Council Bluffs New Police Headquarters, Johnson County Criminalistics Laboratory, Johnson County Justice Annex, Douglas County Corrections Center Expansion, Omaha Public Safety Training Facility, Dept. of Homeland Security/BCIS/BCIE Regional Office, K-State Olathe Innovation Campus, John Knox Village, Johnson County Mental Health, , Hyatt Place Hotel & Lenexa Conference Center, Offut Child Development Center, Boys & Girls Clubs, UMKC Miller Nichols Learning Center, Hilton Garden Inns, City of Shawnee FS71 & FS73.



Jennifer Gerlach, PE

EMAIL AND TELEPHONE NUMBER:

jennifer@project-advocates.com (913) 201-8592

PROJECT ASSIGNMENT:

Project management including pre-construction, budget management, scheduling, cost control, procurement, and value options.

YEARS' EXPERIENCE:

With the firm - 1 year With other firms - 13 years

EDUCATION:

MBA, University of Texas at Dallas

B.S. Architectural Engineering, Kansas State University

LICENSURE:

Licensed Professional Engineer, Mechanical - Kansas, Missouri, Texas

OTHER EXPERIENCE AND QUALIFICATIONS RELEVANT TO THE PROPOSED PROJECT:

Multi faceted A/E/C licensed professional engineer with a background in design and construction management across multiple market types including community, library, education, aquatic, hospitality, residential, nonprofit, senior living, healthcare, industrial and office. Similar project experience includes the Olathe Downtown Library, Merriam Community Center, Shawnee Fire Station 71 & 73 Renovations, Shawnee Visitor's Center, alphapointe renovations, Gaylord Rockies Resort and Aquatic Center, Omaha Public Schools Buena Vista High School, City of Lee's Summit Market Plaza



John C. Taylor

EMAIL AND TELEPHONE NUMBER:

john@project-advocates.com (402) 312-9882

PROJECT ASSIGNMENT:

Principal, Advisory. Project management systems and resources including scheduling, cost control, estimating, and value options.

YEARS' EXPERIENCE:

With the firm - 13 yrs With other firms - 25 yrs

EDUCATION:

B.S. Construction Engineering, University of Nebraska - Omaha (1986)

ACTIVE REGISTRATION:

LEED Accreditation (2005), OSHA 10-hour (2009), First Aid & CPR

OTHER EXPERIENCE AND QUALIFICATIONS RELEVANT TO THE PROPOSED PROJECT:

Extensive Project Management and Client Relationship experience across multiple community-based projects. Founded Project Advocates in 2010 with prior construction and construction management experience for 25 years. Effective in Design-Build, CM@Risk, Design-Bid-Build, and P3 delivery approaches.

Owner's Representative services provided for various clients including TD Ameritrade, Kaneko, Westside Community School District, Hillcrest Health Systems, Children's Hospital, Creighton University, University of Nebraska - Omaha, Tenaska, and Mutual of Omaha to name a few.



Rob Puthoff

EMAIL AND TELEPHONE NUMBER:

Rob.Putthoff@project-advocates.com (816) 405-0626

PROJECT ASSIGNMENT:

Advisory, communications

YEARS' EXPERIENCE:

With the firm - 2 years With other firms - 13 years

EDUCATION:

B.S. Business Management, B.S. Marketing, Park University

ACTIVE REGISTRATION:

LEED Accreditation (2005), EIT (1994), OSHA 30-hour (2009), USACE Quality Control Certified (2009) , First Aid & CPR

OTHER EXPERIENCE AND QUALIFICATIONS RELEVANT TO THE PROPOSED PROJECT:

Variety of Project management experience in diverse construction projects, including but not limited to: access control systems, high purity processing systems for animal health and pharmaceutical applications, new construction and tenant in place multi-family housing, and food and beverage processing.

Various recent clients include Clay County, Preservation of Affordable Housing (POAH) Hawthorne Place & Deerfield Village, First Washington Realty Prairie Village Shops, Corinth Square, Brookside Shops, and Corinth Quarter.



D.5 ADDITIONAL SERVICES



FIRM PROFILE

Optimized Systems is a privately owned specialty engineering and energy management firm. Our primary mission is to help building owners and operators achieve the optimum balance of occupant safety and comfort, building performance, and energy efficiency in new and existing buildings of all types, sizes and complexity. We often work with design and construction teams to deliver professional, third-party commissioning services, as well as energy optimization, energy management, and Master Systems Integrator (MSI) services. We also troubleshoot and resolve operational and functional performance problems plaguing HVAC and building automation systems.

OPERATING PHILOSOPHY

Optimized Systems' primary operating belief is simple: reputation and relationship before revenue. All decisions, actions and recommendations provided by Optimized Systems are grounded on this principle. Optimized Systems also believes in complete transparency and operates accordingly.

VENDOR NEUTRALITY

Optimized Systems is totally independent and does not sell or represent any products or equipment. Our team includes licensed professional engineers, certified energy managers, HVAC specialists, experienced facility managers, and highly credentialed controls professionals with extensive experience in all major brands of building automation systems. Thus, we can support building operators without bias regardless of who their vendors are or what type or brand of equipment they may have. As former facilities managers, we bring a unique understanding day-to-day operations and owner challenges, because we've lived that life.

OPEN-SOURCE SOLUTIONS

Optimized Systems believes in and promotes open-source and open-platform technologies to ensure clients have access to the most flexible, expandable and scalable solutions at the lowest possible cost. By utilizing and promoting open-source and/or open-platform technologies, our clients maintain their operational autonomy and the ability to work with vendors of their choice while preserving their ability to competitively price new systems, system upgrades and system support agreements.

Optimized Systems has helped dozens of clients in healthcare, medical research, higher education, K-12, performing arts, municipalities, non-profits and other industries, save millions of dollars in energy and operating costs. Client references and project experience is available upon request.

Optimized Systems' profile metrics:

- Federal Tax ID: 47-1650267
- Year formed: 2014
- Classification: Small Business
- No. of employees: 17
- Rick Kmiecik, PE license no.: 147224



D.5 ADDITIONAL SERVICES (Continued)

OPTIMIZED SYSTEMS



Rick Kmiecik, PE

President | Senior Project Engineer



BIOGRAPHY

Rick is an accomplished mechanical and energy engineer with more than 25 years of experience in strategizing, planning, designing and managing mechanical systems for maximum performance and energy efficiency, in buildings of all types, sizes and complexity. As a small business owner and a former owner representative for a nationally recognized healthcare and medical research university, Rick has a proven track record as an effective leader and a creative problem solver, and is known for his smart, effective and sustainable energy projects that generate real cost savings.

SELECTED RELEVANT PROJECT EXPERIENCE

Creighton University

Commissioning and Optimization, Multiple Renovation and New Construction Projects, Including New School of Dentistry

- Owner project requirements
- Management, direction, and oversight for multiple projects
- Mechanical systems design and shop drawings review
- Shop drawing review
- Consulting, value engineering & troubleshooting
- Develop standards for controls and Sequence of Operations
- Energy consulting, metering, and management

Omaha Public Schools

Commissioning & Optimization, Multiple Renovation and New Construction Projects

- Owner project requirements
- Management, direction, and oversight for multiple projects
- Mechanical systems design and shop drawings review
- Consulting, value engineering & troubleshooting
- Develop standards for controls and Sequence of Operations

University of Nebraska Medical Center & Nebraska Medicine

Commissioning & Optimization, Multiple Renovation and Retrofit Projects

- Owner project requirements
- Management, direction, and oversight for multiple projects
- Mechanical systems design and shop drawings review
- Consulting, value engineering & troubleshooting
- Develop standards for controls and Sequence of Operations
- Energy consulting, metering, and management
- Operational technology integration
- Lighting systems controls integration

EDUCATION

BS Architectural Engineering, 1996
University of Kansas

REGISTRATIONS

Licensed Professional Engineer
Colorado, Iowa, Nebraska, Texas

Certified Building Commission Professional (CBCP), 2011

Certified Energy Manager (CEM), 2019

Certified Green Building Engineer (GBE), 2019

Certified Measurement and Verification Professional (CMVP), 2020

Certified Master Programmer

AREAS OF EXPERTISE

- *Mechanical Systems Planning & Design*
- *Commissioning & Retro-Commissioning*
- *Energy Studies & Optimization*
- *Energy Measurement & Verification*
- *Interval Data Capture and Analysis*
- *Facility Operations and Management*
- *Facility & Systems Assessments*
- *Building Automation Systems*
- *Controls Programming & Operations*
- *Project Management*



optimized-systems.com

