

SOUTH TEXAS COLLEGE
BOARD OF TRUSTEES SPECIAL MEETING
Monday, October 20, 2014 @ 8:00 a.m.
Ann Richards Administration Building Board Room, Pecan Campus
McAllen, Texas

AGENDA

"At anytime during the course of this meeting, the Board of Trustees may retire to Executive Session under Texas Government Code 551.071(2) to confer with its legal counsel on any subject matter on this agenda in which the duty of the attorney to the Board of Trustees under the Texas Disciplinary Rules of Professional Conduct of the State Bar of Texas clearly conflicts with Chapter 551 of the Texas Government Code. Further, at anytime during the course of this meeting, the Board of Trustees may retire to Executive Session to deliberate on any subject slated for discussion at this meeting, as may be permitted under one or more of the exceptions to the Open Meetings Act set forth in Title 5, Subtitle A, Chapter 551, Subchapter D of the Texas Government Code."

I. Call Meeting to Order

II. Determination of Quorum

III. Agenda Items

1. Discussion and Action as Necessary Regarding 2013 Bond Construction Program Construction Program Manager Contract

IV. Informational Items

A. Next Meetings:

- Regular Meeting of the Board of Trustees, Tuesday, October 28th, 2014 at 5:30 p.m., Ann Richards Administration Building Board Room, Pecan Campus, McAllen, Texas

B. Other Announcements:

- Early Voting for the November 4, 2014 General Election starts today:

Pecan Campus

- Early Voting - Monday, October 20, 2014 (7 a.m. – 7 p.m.)
- Early Voting - Thursday, October 23, 2014 (7 a.m. – 7 p.m.)
- Election Day - Tuesday, November 4, 2014 (7 a.m. – 7 p.m.)

Mid Valley Campus

- Early Voting - Tuesday, October 28, 2014 (7 a.m. – 7 p.m.)

Nursing & Allied Health Campus

- Early Voting - Thursday, October 30, 2014 (7 a.m. – 7 p.m.)
- Election Day - Tuesday, November 4, 2014 (7 a.m. – 7 p.m.)

V. Adjournment

South Texas College
Construction Program Management Services
RFQ, Submitted Qualifications, and Contract

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1.

Request for
Qualifications for
Construction Program
Management
Services, with
Addendums

**REQUEST FOR QUALIFICATIONS
FOR
CONSTRUCTION PROGRAM MANAGEMENT SERVICES**

**2013 Bond Construction Program
Voter Approval – November 5, 2013**



**RFQ No. 13-14-1036
Request for Qualifications
For Construction Program Management Services**

January 6, 2014

**SOUTH TEXAS COLLEGE
REQUEST FOR QUALIFICATIONS FOR CONSTRUCTION PROGRAM
MANAGEMENT SERVICES
RFQ NO. 13-14-1036**

South Texas College requests sealed QUALIFICATIONS FOR CONSTRUCTION PROGRAM MANAGEMENT SERVICES for proposed construction services.

Responses should be submitted with an original and four copies no later than **2:00 p.m., Thursday, February 6, 2014** (Central Standard Time). **Faxed or email responses will not be considered.**

Responses shall be submitted in a sealed envelope plainly marked with the name and address of Respondents as well as with the following notation: "QUALIFICATIONS FOR CONSTRUCTION PROGRAM MANAGEMENT SERVICES" for proposed construction projects, plus the date and time deadline for responses. Late RESPONSES will not be considered, and will be returned unopened.

Responses must be submitted to: South Texas College
 Purchasing Department

Street Address: 3200 W. Pecan Blvd.
 Suite 145
 McAllen, TX 78501

U.S. Mail Address: P O Box 9701
 McAllen, TX 78502

RFQ No.: 13-14-1036

DEADLINE FOR SUBMISSIONS: **Thursday, February 6, 2014, 2:00 p.m.**

South Texas College
Purchasing Department
3200 W. Pecan Blvd., Suite 145
McAllen, TX 78501

SECTION 1 – GENERAL REQUIREMENTS

1.1 **GENERAL:** South Texas College (“College”) is soliciting statements of qualifications (“Qualifications”) from professional firms (“Respondents”) to provide the College Construction Program Management Services as here in set out. Selection of a firm shall be done in accordance with the terms, conditions, and requirements generally set forth in this Request for Qualifications (RFQ). This RFQ provides Respondents with the information necessary to prepare and submit Qualifications for review by the College.

1.2 **HISTORICAL BACKGROUND:**

South Texas College was created in 1993 to serve the populations of Hidalgo and Starr Counties. Since its inception, the College has experienced rapid growth, creating an increased need for facilities. The College addresses the diverse educational and technical training needs of the people of Hidalgo and Starr Counties.

In November of 2013 South Texas College voters approved \$159 million in bonds to fund the construction of new facilities. Voters also approved funds for the operation and maintenance of the new facilities. STC has completed a Facilities Master Plan to prepare for the implementation of Bond Construction Program. In the Master Planning process, the College has established the following basic components of the Bond Construction Program:

- Number of new buildings to be constructed at each of seven (7) campuses/centers;
- Expansion of existing buildings;
- Renovations to existing buildings;
- Additional parking and site improvements;
- Addition of Physical Plants on two campuses;
- Expansion of Physical Plant on one campus;
- Proposed budgets required for all construction;
- Facility Space programming for all functions in each building;
- Program phases and master schedule for design and construction;
- Design standards and guidelines;

As the College moves into the first phase of this bond construction program, it has recognized the importance of contracting with a Construction Program Manager who will assist the administrative staff of STC through all phases of the Bond Construction Program. The College intends to contract a Construction Program Manager with expertise capable of managing the overall administrative, design and construction work required. Exhibit A attached outlines all proposed construction projects included in the 2013 Bond Construction Program. The general responsibilities of the Construction Program Manager will be as follows:

- To coordinate with College administration to effectively plan and report on all phases related to the construction program in order to successfully complete the design and construction requirements while maintaining College’s facility quality standards, program budget and schedules;

- To coordinate with all design professionals to convey STC’s master plan, design standards and guidelines, to produce construction documents consistent with the master plan, budgets and schedules established by the College; and
- To coordinate with all contractors for compliance with all the requirements set forth in the construction documents, and produce a consistent level of quality for all construction projects in accordance with the Facilities Master Plan, the budget and the Construction schedule established by the College

1.3 INQUIRIES AND INTERPRETATIONS: Respondents shall tender written inquiries regarding interpretations or changes in the RFQ. Responses by the College to written inquiries which directly affect an interpretation or change to this RFQ will be issued in writing by the College as an addendum, and faxed or mailed to all parties recorded by the College as having received a copy of the RFQ. All such addenda issued by the College prior to the time that responses are received shall be considered part of the RFQ, and the Respondent shall be required to consider and acknowledge receipt of each addendum in its Qualifications.

1.4.1 QUALIFICATIONS SUBMITTAL DEADLINE: College will accept Qualifications until Thursday, February 6, 2014 2:00 p.m. local time. Qualifications shall be submitted to:

South Texas College
Purchasing Department
3200 W. Pecan Blvd., Suite 145
McAllen, TX 78501

1.5 SUBMISSION OF QUALIFICATIONS:

1.5.1 Submit five (5) identical copies of the Qualifications, including any supplemental printed material referenced within the Qualifications. An original signature must appear on the “Statement of Interest” document of all submitted copies. The Qualifications must be received on or before the time and date specified above by the point-of-contact identified below.

1.5.2 Late Qualifications properly identified will be returned to the Respondent unopened. Late Qualifications, depending upon circumstances, may be considered acceptable at the College’s discretion.

1.5.3 The College will not accept Qualifications that are delivered by telephone, facsimile (fax), or electronic mail (e-mail).

1.5.4 Submittals properly received will become the property of the College and WILL NOT be returned to Respondents.

1.6 POINT-OF-CONTACT: The College requires that Respondents restrict all contact and questions regarding this RFQ to the individual named below via email and fax only.

Gerardo M. ‘Gerry’ Rodriguez, Jr., AIA, Director
South Texas College

Facilities Planning and Construction
3201 W. Pecan Blvd.
McAllen, Texas 78501
Fax: (956) 872-3747
Email: gerry@southtexascollege.edu

- 1.7 QUALIFICATION-BASED SELECTION PROCESS: Professional services will be procured in accordance with Chapter 2254 of the Government Code, Title 10, Subchapter A. Professional Services. Selection of the most highly qualified Respondent will be made on the basis of demonstrated competence, experience and qualifications, as set forth in Section 3.
- 1.8 EVALUATION OF QUALIFICATIONS: The evaluation of Qualifications shall be based on the Respondent's information submitted in response to the items in SECTION 3 of this RFQ. All Qualifications will be evaluated, and the College may invite one or more of the top-rated Respondents to attend a formal interview in McAllen, Texas, before final ranking of the Respondents for one or more projects. The interview will allow the invited Respondents to further discuss their qualifications, and to respond to questions from the College. The College will make public the name of the selected Respondent after the College has successfully negotiated terms of a professional services agreement.
- 1.9 NOTICE TO AVOID POTENTIAL CONFLICT: Respondents are advised that the Construction Program Manager contract will prohibit an affiliate of the Construction Program Manager from participating in any capacity, directly or indirectly, in the College's Bond Construction Program, including, but not limited, in a capacity as a designer (architect or engineer) or as general contractor, subcontractor or materials supplier in a construction project awarded by the College.

Definition - An affiliate is a firm or individual with which the Construction Project Management Firm has a business or commercial interest.

SECTION 2 – SERVICES TO BE PROVIDED BY THE CONSTRUCTION PROGRAM MANAGER

The College anticipates that the following responsibilities and tasks shall be included in the Construction Program Manager's scope of service:

2.1 General Program Management Requirements

- Conduct partnering and kickoff meetings with Owner, Architects, Engineers and Contractors per campus or project;
- Update and track program plan for each campus to include design schedule, team members, meeting schedules, construction schedule, budget, cost estimates, progress report formats, format for document management for all phases;
- Prepare and submit status reports on a monthly basis for presentation to the College's Administration and Board of Trustees
- Conduct regular meetings with College's Facilities Planning & Construction staff for review of overall program status and address matters needing direction and/or resolution
- Become familiar with index of terms for master filing of all projects including e-mailed files and AutoCADD 2014 version files
- Become familiar with and manage compliance with the following:
 - The college's master plans per campus included in program
 - The college's facilities space programs for each project in program
 - The college's facilities design standards and guidelines
 - The college's space standards and technical requirements
 - The college's overall program budget and related detail
- Implement and manage an internet accessible electronic file management and reporting system to be used for updates throughout the program management period
- Program management team will include, but not be limited to, the following members and responsibilities
 - Program management executive
 - Assistant program manager(s)
 - Administrative coordinator(s)/assistant(s)
 - Program documents manager
 - Cost estimator/budget manager
 - Plan reviewer(s)
 - Construction inspector(s)

2.2 Architects and Engineers Selection

- Assist with criteria, solicitation, evaluation, selection and assignments of potential design team(s) who are qualified and capable of performing the scope of work and meet program schedules, consistent with College's plans and policies.

2.3 Implement Space Program Requirements

- Conduct meetings with staff to update and confirm space programming needs including technical requirements such as telecommunication systems, special equipment and furniture needs and provide data to architects
- Communicate the College's Space standards to direct design teams on the use of standards for each proposed facility

2.4 Schematic Design Phase

- Communicate all project planning information to Architects and/or Engineers
- Conduct weekly or bi-weekly project design meetings between Owner and Architect
- Conduct review of project schedules and conduct schedule optimization sessions(s)
- Conduct cost estimates and take action to keep cost under control
- Coordinate, review, evaluate and recommend approval of all schematic design documents submitted by architects and engineers
- Check for compliance with STC's design guidelines and space program needs per campus
- Review construction documents for compliance with program requirements and completeness

2.5 Design Development Phase

- Continue weekly or bi-weekly meetings between Owner, Architects, Engineers and Contractors to review and evaluate design documents for compliance with guidelines
- Develop a schedule for Design Development stage
- Coordinate plan reviews as required by Texas Department of Licensing and Regulation for compliance with American with Disabilities Act
- Conduct Schedule Optimization sessions
- Conduct cost estimates and take action to keep cost within construction budget limitations without compromising standards and quality of construction
- Conduct detailed cost estimates at end of Design Development and provide owner with a detailed report
- Coordinate, review and evaluate all design development documents submitted by architects and engineers for compliance with STC's design guidelines, detailed program needs and performance specifications per campus
- Check for compliance with STC's design guidelines and space program needs per campus
- Review construction documents for compliance with program requirements and completeness
- Coordinate and review geotechnical investigation reports for each applicable project

2.6 Construction Document Phase

- Develop schedule for plan reviews at 25%, 50%, 75% and 95% of completeness
- Coordinate with STC staff for review and discussion at various levels of completeness for compliance with STC's design guidelines and detailed program needs per campus before proceeding with construction
- Coordinate, review, evaluate and recommend approval of all final construction documents submitted by architects and consultant engineers

2.7 Contractor Procurement Phase

- Assist owner with updates to contractor selection criteria if needed
- Assist with solicitation, evaluation and selection of potential contractors who are qualified and capable of performing the scope of work, controlling cost and meeting schedules
- Assist in preparation of contracts and contract negotiations
- Assist Owner with re-solicitation if necessary

- After selection and approval of contractor by owner, assist Architect with transmitting construction contract documents to contractor(s)
- Request and review information submitted by contractor to include insurance, employee pay scales, subcontractors list, bonds, and insurances

2.8 Construction Phase

- Conduct construction update meetings at construction sites as scheduled
- Review required documents from contractor including, Building Permits, Safety Plan, and Environmental Compliance plan, and report to architect and owner
- Review Contractor cost control plan with Architect and Owner
- Evaluate requests for proposed Change Orders and Construction Change Directives and make recommendations
- Review materials testing reports and services during all applicable phases
- Conduct periodic site visits to review work in place and report in a standard format to Owner with reference to construction documents, schedules and budgets
- On a regular schedule, review contractor's compliance with all plans, specifications and required terms and conditions and report to owner on status
- Evaluate payment applications and make recommendations on approval of requests for progress payments
- Perform substantial completion inspections and work with A/E team to prepare punch lists
- Perform final inspections and review punch list work
- Conduct periodic program management meetings with owner for updates on progress, budget status and construction matters
- Ensure overall contractor compliance with terms and conditions of construction contract

2.9 Final Phase

2.9.1 Commissioning

- Coordinate with contractor to perform HVAC Testing and Balancing as needed
- Review the results of the HVAC Testing and Balancing for compliance with construction contract documents requirements
- Oversee delivery of all certification documentation to proper agencies on behalf of owner
- Coordinate training of facility maintenance staff for familiarization with all systems
- Coordinate delivery of all completed as built drawings
- Coordinate delivery of all certifications applicable to building systems

2.9.2 Warranty/Occupancy

- Review all contractual and warranty obligations for compliance including the issuance of all documents such as operations and maintenance manuals
- Generate and deliver tickler file including calendar of all warranty deadlines for each project
- Coordinate closing reviews of warranty items after a 30 day and 6 month period

SECTION 3 - REQUIREMENTS FOR STATEMENT OF QUALIFICATIONS

3.1 PART ONE: STATEMENT OF INTEREST

- 3.1.1 Provide a statement of interest for the construction program, including a narrative describing the prime firm's unique qualifications.
- 3.1.2 Provide a statement about the availability and commitment of the prime firm and its principal(s) and key professionals to undertake the project.
- 3.1.3 Provide a statement describing how the prime firm and associated team members can provide benefit during the various phases of a construction program

3.2 PART TWO: PRIME FIRM EXPERIENCE

- 3.2.1 Provide resumes giving the experience and expertise of the principals and key professional members for the prime firm that will be involved in the project, including their experience with similar projects and the number of years with the prime firm.
- 3.2.2 Describe the proposed project assignments and lines of authority and communication for principals and key professional members of the prime firm that will be involved in the project. Indicate the estimated percent of time these individuals will be involved in the project.
- 3.2.3 Provide number years the prime firm has provided construction program management services
- 3.2.4 Describe how the prime firm proposes to coordinate, schedule and manage owner requirements, design phase and construction of the proposed construction program
- 3.2.5 Provide address for location of prime firm and number of project team members located within the College district while services are provided
- 3.2.6 Describe the types of insurance coverage and limits which the prime firm currently has and additional limits the prime firm could provide if awarded the contract

3.3 PART THREE: PROJECT TEAM

- 3.3.1 Provide an organizational chart showing the roles of the prime firm and each sub-group or individuals indicating their respective roles with the number of campuses and projects as identified in Exhibit A attached.
- 3.3.2 For each team or individual that the prime firm proposes, if applicable:
 - Identify the team/individual and provide a brief history
 - Describe the team/individual's proposed role in the project
 - Describe the team/individual's related project experience
 - List projects that the prime firm and the team/individuals have worked on together

- Provide resumes giving the experience and expertise of principals and key professional team members who will be assigned to the project.

3.4 PART FOUR: REPRESENTATIVE PROJECTS

3.4.1 List a maximum of five (5) educational projects for which the prime firm provided or is providing construction program management services which are most related to this program. Provide the following information for each project listed:

- Project name and location
- Project Owner
- Project construction cost
- Project size in gross square feet
- Description of professional services prime firm provided for the project
- Whether the project was new construction, an addition, or a renovation
- Dates for planning, design, and construction of the project(s), including the date the construction was substantially complete or is scheduled to be substantially complete
- Description of prime firm's contracted responsibility for the project (prime professional, joint venture, or consultant)
- Lead Project Manager (individual responsible to the client for the day to day work and the overall success of the project)
- Description of how this project is similar and why the services provided are relevant to this project.
- Names of consultant firms and their areas of responsibility.

3.5 PART FIVE: REFERENCES

3.5.1 Provide reference contact information for any five (5) of the projects listed in response to 3.4.1. The references shall include:

- Owner's name, Owner's representative who served as the day-to-day liaison during planning, design, and construction of the project, and the Owner representative's telephone number.

3.6 PART SIX: ADDITIONAL INFORMATION

3.6.1 Provide any additional information that the prime firm believes may better describe its qualifications and/or be of benefit to the College and any additional information relevant to the services to be provided to the College as specified in Section 2.

SECTION 4 – FORMAT FOR STATEMENT OF QUALIFICATIONS

4.1 PAGE SIZE, BINDING, DIVIDERS, AND TABS:

- 4.1.1 Submittals should be printed on letter-size (8-1/2” x 11”) paper and assembled with spiral-type bindings or staples. **DO NOT USE METAL-RING HARD COVER BINDERS.**
- 4.1.2 Preprinted material should be referenced in the submittal and included as labeled attachments.
- 4.1.3 Separate each part of the Qualifications by use of a divider sheet with an integral tab for ready reference. Identify the tabs in accordance with the parts under **Section 3 - Requirements for Statement of Qualifications.**

4.2 TABLE OF CONTENTS:

- 4.4.1 Include a Table of Content for the Qualifications and give page numbers for each part of the Qualifications as well as any separate attachments. Supplementary information not required by **Section 3 – Requirements for Statement of Qualifications** should be clearly identified in the Table of Contents and provided as a separate part.

4.3 PAGINATION:

- 4.3.1 Qualifications shall be a maximum of 50 pages. The covers, table of contents, and divider sheets do not count as pages.

SECTION 5 – PRE-QUALIFICATION CONFERENCE

5.1 Pre-qualification conference:

- 5.1.1 Respondents are invited to attend a pre-qualification conference presented by the College for review of the proposed Construction Program including master plan, space needs, design standards, space standards, estimated budgets and preliminary schedules. This conference will also provide information related to the requirements of this RFQ and procedure for procurement of desired services. The College believes the information provided at this session will be essential for any firm desiring to respond to this RFQ. All Respondents are urged to attend.
- 5.1.2 The Pre-qualification conference is scheduled for **Thursday, January 16, 2014 at 2:00 p.m.** at the following location:
 - South Texas College Purchasing Department
 - 3200 W. Pecan Blvd., Ste. 142
 - McAllen, Texas 78501

ADDENDA CHECKLIST

Any addenda issued by STC to this RFQ will become part of the RFQ. Addenda will be numbered sequentially. Respondent must indicate on this sheet the receipt of any and all addenda.

Receipt is hereby acknowledged of the following addenda to this RFQ.

No. 1 _____

No. 2 _____

No. 3 _____

No. 4 _____

Company/Entity Name: _____

Authorized Signature

EXECUTION OF OFFER

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE STATEMENT OF QUALIFICATIONS MAY RESULT IN REJECTION THE QUALIFICATIONS.

In compliance with this solicitation, and subject to all the conditions herein, the undersigned offers and agrees to furnish the products and/or services described in its Statement of Qualifications. Failure to sign the offer, or signing it with a false statement, shall void the submitted offer or any resulting contract, and the Respondent may be removed from STC vendor lists.

By signature hereon, the Respondent acknowledges and agrees that 1) this is a solicitation for qualifications and is not a contract or an offer to contract; 2) the submission of a statement of qualifications by Respondent in response to this solicitation will not create a contract between respondent STC and Respondent; and 3) STC has made no representation or warranty, written or oral, that one or more contracts with STC will be awarded under this solicitation.

By signature hereon, the Respondent hereby certifies that it is not currently delinquent in the payment of any franchise taxes owed the State of Texas under Chapter 171, Tax Code, if applicable.

By signature hereon, the Respondent hereby certifies that it is not debarred, suspended or otherwise declared ineligible for 1) participation in federal programs (pursuant to 24 CFR 84.13), or 2) doing business with the State of Texas.

By executing this offer, Respondent affirms that he/she has not given, offered to give, nor intends to give at anytime hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer.

By the signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership, or institution represented by the Respondent or anyone acting for such firm, corporation, or institution has violated the antitrust laws of the State of Texas, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the offer made to any competitor or any other person engaged in such line of business.

By signature hereon, Respondent certifies that the individual signing this document and the documents made part of this solicitation is authorized to sign such documents on behalf of the company and to bind the company under any contract which may result from the submission of this proposal.

By signature hereon, Respondent affirms that he has not prepared, or assisted in the preparation of, the specifications or other requirements for this solicitation.

By signature hereon, Respondent signifies his compliance with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action.

By signature hereon, Respondent signifies his compliance with requirements of the Drug-Free Workplace Act of 1988.

By signature hereon, Respondent represents and warrants that it is a reputable company regularly engaged in providing the products and/or services necessary to meet the terms, conditions and requirements of this solicitation.

Proposal must include Taxpayer Identification Number, full firm name and address of Respondent. Failure to manually sign proposal will disqualify it. The person signing the proposal should show title or authority to bind his/her firm in contract.

Taxpayer Identification Number: _____

Respondent/Company: _____

Signature: _____

Name (Typed/Printed): _____

Title: _____

Street: _____

City/State/Zip: _____

Telephone No.: _____

Fax No.: _____

SOUTH TEXAS COLLEGE

TO BE SUBMITTED WITH BID/PROPOSAL/QUOTE

State of Texas legislative Bill No. 1 Section 4.034, Notification of Criminal History, Subsection (a) states
“ a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.”

Subsection (b) states “ a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.”

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY-HELD CORPORATION

Please check off one box and sign the form in the appropriate space

I, the undersigned agent for the firm named below, certify; that the information concerning notification of felony convictions has been reviewed by me and the information furnished is true to the best of my knowledge.

VENDOR'S NAME: _____

AUTHORIZED COMPANY OFFICIAL'S NAME (PRINTED): _____

A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

SIGNATURE OF COMPANY OFFICIAL _____

B. My firm is not owned nor operated by anyone who has been convicted of a felony.

SIGNATURE OF COMPANY OFFICIAL _____

C. My firm is owned and/or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s) _____

Details of Conviction(s) _____

SIGNATURE OF COMPANY OFFICIAL _____

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

Signature of person doing business with the governmental entity

Date

Adopted 06/29/2007

Exhibit A

STC Bond 2013 - Proposed Construction Projects

Construction Project Description	Proposed Square Feet
<i>Pecan Campus</i>	
Construct new north academic building with classrooms, computer labs, and support space to accommodate student enrollment growth	61,267
Construct new south academic building with classrooms, computer labs, and support space to accommodate student enrollment growth	40,000
STEM (Science, Technology, Engineering, and Math) building with related classrooms and labs	48,879
Multi-purpose space for student support services and activities	33,042
Thermal Plant	1,440
Parking and Sitework	n/a
Subtotal	184,628
<i>Nursing & Allied Health Campus</i>	
Major campus expansion for new and expanded nursing and allied health training programs, hospital simulation center, and library	87,222
Parking and Sitework	n/a
Subtotal	87,222
<i>Technology Campus</i>	
Expansion for technical and workforce training programs in response to local employment opportunities	72,000
Parking and Sitework	n/a
Subtotal	72,000
<i>Mid Valley Campus</i>	
Health professions, STEM (Science, Technology, Engineering, and Math) and other academic programs, labs, and related classrooms	76,069
Expansion of facilities for: high-wage, high-demand workforce training	10,000
Expansion of library	10,369
Expansion of student advising and student services building	14,269
Thermal Plant	4,000
Parking and Sitework	n/a
Subtotal	114,707
<i>Starr County Campus</i>	
Construct Health Professions and Science Center with classrooms and labs to offer nursing and allied health programs and STEM (Science, Technology, Engineering, and Math) programs	48,690
Expand technical workforce training facilities for high-wage, high-demand jobs	9,302
Construct new library and renovate existing space for Cultural Arts Center	16,516
Expansion of student services, advising, admissions, and financial services building	5,000
Expansion of student activities building	4,923
Thermal Plant	4,000
Parking and Sitework	n/a
Subtotal	88,431
<i>Regional Center for Public Safety Excellence - Pharr</i>	
Establish new Regional Center for Public Safety Excellence to provide regional law enforcement, and public safety training	16,000
Parking and Sitework*	n/a
Subtotal	16,000
<i>STC La Joya Teaching Site (Jimmy Carter ECHS)</i>	
Develop STEM (Science, Technology, Engineering and Math) labs and entry level workforce training programs	11,000
Subtotal	11,000
TOTAL	573,988

Addendum 1



South Texas College
PURCHASING DEPARTMENT
3200 W PECAN BLVD, BLDG N, STE 145
MCALLEN, TX 78501

**REQUEST FOR
QUALIFICATIONS
ADDENDUM NO. 1**

RFQ NUMBER: 13-14-1036
RFQ TITLE: CONSTRUCTION PROGRAM MANAGEMENT SERVICES

Addendum Issue Date: January 22, 2014

******SEE ATTACHED ******

RFQ # 13-14-1036 is amended as follows:

1. The street address indicated for South Texas College on page 2 and in section 1.4.1 on page 4 is modified to add the building name as follows:

South Texas College
Purchasing Department
3200 W. Pecan Blvd., Bldg. N, Suite 145
McAllen, TX 78501

Addendum 2



South Texas College
PURCHASING DEPARTMENT
3200 W PECAN BLVD, BLDG N, STE 145
MCALLEN, TX 78501

**REQUEST FOR
QUALIFICATIONS
ADDENDUM NO. 2**

RFQ NUMBER: 13-14-1036
RFQ TITLE: CONSTRUCTION PROGRAM MANAGEMENT SERVICES

Addendum Issue Date: January 28, 2014

******SEE ATTACHED ******

RFQ # 13-14-1036 is amended as follows:

The following item is added under section 3.3.2:

- Provide a list of all principals and key team members who are registered architects or engineers.

Addendum 3



South Texas College
PURCHASING DEPARTMENT
3200 W PECAN BLVD, BLDG N, STE 145
MCALLEN, TX 78501

**REQUEST FOR
QUALIFICATIONS
ADDENDUM NO. 3**

RFQ NUMBER: 13-14-1036
RFQ TITLE: CONSTRUCTION PROGRAM MANAGEMENT SERVICES

Addendum Issue Date: January 30, 2014

******SEE ATTACHED ******

RFQ # 13-14-1036 is amended as follows:

Several modifications have been made to SECTION 2 (“SERVICES TO BE PROVIDED BY THE CONSTRUCTION PROGRAM MANAGER”) of the RFQ. The revised SECTION 2 provided below replaces the entire original SECTION 2:

The College has outlined the following responsibilities and tasks which shall be included, but not limited to the Construction Program Manager’s scope of service:

2.1 General Program Management Requirements

- Conduct partnering and kickoff meetings with College staff, Architects, Engineers and Contractors per campus or project to establish communication protocol and coordination logistics;
- Update and track program plan for each campus to include design schedule, team members, meeting schedules, construction schedules, budgets, cost estimates, progress report formats and format for document management for all phases;
- Prepare and submit status reports on a monthly basis for presentation to the College’s Administration and Board of Trustees
- Conduct regular meetings with College staff for review of overall program status and address matters needing direction and/or resolution
- College’s index of terms for master filing of all projects including e-mailed files and AutoCADD 2014 version files
- Become familiar with and manage compliance with the following:
 - The College’s master plans per campus included in program
 - The College’s facilities space programs for each project in program
 - The College’s facilities design standards and guidelines
 - The College’s space standards and technical requirements
 - The College’s overall program budget and related detail
- Implement and manage an internet accessible electronic file management and reporting system used for archiving and reporting throughout the program management period
- Program management team will include, but not be limited to, the following members and responsibilities
 - Program management executive
 - Assistant program manager(s)
 - Administrative coordinator(s)/assistant(s)
 - Program documents manager
 - Cost estimator/budget manager
 - Plan reviewer(s)
 - Construction inspector(s)

2.2 Architects and Engineers Selection

- Coordinate development of RFQ, solicitation, evaluation, selection and project assignments for potential design team(s) who are qualified and capable of performing the scope of work and meet program schedules consistent with College’s plans and policies.

2.3 Implement Space Program Requirements

- Conduct meetings with College staff to update and confirm space programming needs including technical requirements such as telecommunication systems, special equipment and furniture needs and provide data to architects
- Communicate the College's space standards to design teams for use on design of each proposed facility

2.4 Schematic Design Phase

- Communicate all project planning information to all design teams
- Conduct weekly or bi-weekly design review meetings between College staff and design teams
- Conduct review of project schedules and conduct schedule optimization sessions(s)
- Conduct cost estimates and take action to keep cost within budget limitations
- Coordinate the review and evaluation of schematic design documents to maintain compliance with program planning documents
- Recommend approval of schematic design documents submitted by architects and engineers when complete
- Verify compliance with the College's design guidelines and space program needs per building

2.5 Design Development Phase

- Continue weekly or bi-weekly meetings with College staff and design teams to review and evaluate design documents for compliance with program requirements
- Develop and manage schedules per project for Design Development phase
- Coordinate plan reviews as needed to ensure compliance with all regulatory agencies and code requirements
- Conduct Schedule Optimization sessions for Design Development phase
- Prepare cost estimates as needed and take action to keep cost within construction budget limitations without compromising standards and quality of construction
- Conduct detailed cost estimates at end of Design Development phase and provide owner with a detailed report
- Coordinate, review and verify all design development documents submitted by design teams for compliance with the College's design guidelines and space programs per building project
- Coordinate, review and deliver geotechnical investigation reports to each design team per building project

2.6 Construction Document Phase

- Develop schedule for plan reviews at 25%, 50%, 75% and 95% of completeness
- Coordinate with College staff for review and discussion of Construction Documents at various levels of completeness to verify compliance with College's design guidelines and program needs per building project before proceeding with construction
- Coordinate, review, verify and recommend approval of all final construction documents submitted by each design team

2.7 Contractor Procurement Phase

- Review and recommend updates, if needed, for contractor selection criteria

- Coordinate development of RFP, solicitation, evaluation and selection of potential contractors who are qualified and capable of performing the scope of work, controlling cost and meeting schedules
- Coordinate development of contracts and conduct contract negotiations
- Prepare recommendations for approval of contractor contracts by the College Board of Trustees
- Coordinate with College staff for re-solicitation of construction services if necessary
- After selection and approval of contractor(s) by the College, coordinate the delivery of construction contract documents to contractor(s)
- Request and review documents from the contractor(s) such as insurance certificates, subcontractors list, bonds and insurances

2.8 Construction Phase

- Schedule and conduct bi-weekly construction update meetings with College staff, design team and contractor for each construction project
- Verify required documents from contractor such as, Building Permits, Safety Plans, and Environmental Compliance plan, and report to College staff and design team
- Review Contractor's cost control plan with College staff and design team to identify potential improvements
- Review and monitor all Evaluate and make recommendation on requests for proposed Change Orders and Construction Change Directives
- Review materials testing reports and services during all applicable phases for compliance with construction documents
- Conduct weekly site visits to review work in place and report in an agreed upon format to the College for compliance with construction documents, schedules and budgets
- Assist Owner in determining if Contractor is conforming to the Construction Contract and General Conditions set forth by the Owner Review and verify contractor's compliance with all plans, specifications and contract terms and report to College staff on status
- Review payment applications for accuracy and relation to completed work, then make recommendations on approval
- Perform substantial completion inspections and work with design team to prepare punch lists
- Review submittals from contractor requiring Owner approval Perform final inspections and determine completeness of punch list work
- Conduct monthly program management meetings with owner for updates on progress, budget status and construction matters
- Monitor and ensure overall contractor compliance with terms and conditions of construction contract documents

2.9 Final Phase

Commissioning

- Coordinate with contractor to perform HVAC Testing and Balancing as needed and submit reports to design team and College staff
- Review the results of the HVAC Testing and Balancing for compliance with construction contract documents requirements
- Coordinate and verify delivery of all certification documentation to proper agencies on behalf of the College
- Coordinate and schedule training for College staff to become familiar with all building systems

- Coordinate delivery of all completed as built drawings to the College
- Coordinate delivery of all certifications applicable to building systems to the College

Warranty/Occupancy

- Identification of Review all contractual and warranty obligations for compliance with construction documents including delivery of all documents such as operations and maintenance manuals
- Generate and deliver to the College a tickler file including calendar dates for all warranty deadlines per building project
- Coordinate and schedule closing reviews for warranty items after 30 day and 6 month periods

2.
Qualifications
Submitted By:

Broaddus &
Associates

Statement of Qualifications for
Construction Program Management Services

RFQ No. 13-14-1036

Submitted To
South Texas College

February 6, 2014



PROJECT MANAGEMENT



BBROADDUS
KASSOCIATES

**BROADDUS
& ASSOCIATES**
INNOVATIVE PROJECT MANAGEMENT AND PLANNING

February 6, 2014

South Texas College
Purchasing Department
3200 W. Pecan Blvd., Suite 145
McAllen, TX 78501

Re: RFQ No. 13-14-1036

Dear Members of the Selection Committee:

We are pleased to submit our response to the Request for Statement of Qualifications for Construction Program Management Services of the 2013 Bond Construction Program. It is an exciting time to be a member of the local community, and we look forward to the opportunity to prove our value to your team. Our interest is augmented by the fact that our Valley office is in McAllen where our core staff resides and from where for the last 12 years we have overseen approximately \$400M in projects.

While the documents that accompany this letter address your specific requirements for information relating to resources, experience, and qualifications, we also want to emphasize the uniqueness and innovation of our approach and our management philosophy. These practices and our commitment to our clients differentiate us from other firms seeking to provide these services.

- **A History of Success with South Texas College.** Our team provided program management services to South Texas College on your successful 2001 Bond Construction Program. Our owner-oriented program management services resulted in a program using multiple architects and contractors who were selected, contracted and managed by our team in a fair, open, objective, equitable and ethical manner. The final \$98.7 million bond program, which including a diverse collection of facilities, was completed on schedule and budget and without litigation. Our team, working with STC, assisted in generating more than \$16 million in total program savings. This was all accomplished at the same time with additional property purchases and increased scope.
- **Specific Experience with Higher Education Bond Programs.** Our firm has significant experience with managing capital improvement programs for higher education clients. In the following proposal, we've outlined our history of creating value for these entities, particularly community college systems. Our project portfolio includes working for many of Texas' major higher education, research and healthcare institutions.
- **Unmatched Local Experience from Exceptional Professionals.** Our firm has maintained an office in McAllen since 2001 and has managed a diverse portfolio of projects in the Rio Grande Valley. Our experienced employees include local architects, engineers and construction professionals who have specific experience with South Texas projects. Our project portfolio includes successful initiatives with such clients as the City of McAllen, Edinburg Consolidated Independent School District, Texas Southmost College, Hidalgo County, Starr County, South Padre Island, Tropical Texas Behavioral, and others.
- **Owner-Oriented Program Management – Our Core Business.** The presence of a proactive and effective owner's project manager is central to the success of a project. Project and Program Management is our main business: we are not the architect or contractor. Thus, our team has specific experience in the role solicited in this request.
- **Embracing Public Oversight.** Our team understands the importance of open communication and financial stewardship on taxpayer funded initiatives. Our team will provide timely reports on construction progress and the expenditure of public funds. Broaddus & Associates is extremely experienced in the public arena and will make available accurate, ongoing construction progress and budget status reports to coincide with scheduled city or community meetings. All necessary checks and balance procedures will be in place to make sure that the community tax dollars are spent in an open, fair and transparent manner.

- **Project Communication/Reporting.** In addition to the scheduled reporting managed by our on-site personnel, our firm utilizes a proprietary online project management software called Owner InSite (OIS). This resource is an owner-oriented, web-based information software system that provides any project participant the ability to track and engage in information exchange during all project phases. Since its development in 2003, the software has been used on over \$3.1 billion in projects for a variety of education, healthcare, laboratory and public initiatives. The web-based information management system concept and iteration was developed for South Texas College and has been continuously improved to include an accounting module.
- **Project Management Services that Pay Back Far More than they Cost.** Services from Broaddus & Associates mean the value provided exceeds the cost several times over. While the intangible benefits cannot be measured, we do track the tangible savings and they always exceed our fee. Examples of these savings are outlined in this response.
- **The Best Rewards Come From Giving Back.** Our firm and its people can be found helping those who need it most in every community where we work. Our involvement with The Edinburg Boys & Girls Club, Edinburg Chamber of Commerce, Edinburg CISD Superintendent's scholarship program, STC Valley Scholars, South Padre Island Chamber of Commerce, Texas Southmost College Quinceanaria Scholarship Endowment, City of McAllen Mayor's Scholarship Program and the McAllen Chamber of Commerce are just a few examples of many where we give and participate both corporately and privately. Our enterprise is more than a business; it's about making better places, one person at a time.
- **Alternate Project Delivery Knowledge.** Broaddus & Associates has executed more alternate project delivery methods and most importantly Construction Management at Risk than any other organization in Rio Grande Valley. We know the process, the local contractor and subcontractor market that allows for maximizing local participation. This open transparent process provides the STC constituents comfort that their interests are protecting and at the same time maximizes value.
- **Innovative Strategies.** Broaddus & Associates is not just a "management" service provider. We are industry leaders in innovation. These innovations may include Building Information Modeling, real-time communication tools, procurement and others that increase value to Owner. We will search for every possible opportunity to maximize value.
- **Executive Involvement.** Our leadership monitors our projects closely. As an example, every project manager briefs the CEO on every project as a part of monthly reviews. While our project managers have the experience and authority to independently manage, our leaders know staying aware of potential issues will ensure an owner's project always stays on track.

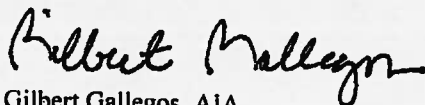
The region served by your institution is one of the fastest growing in the United States, so achieving your capital improvement needs is vital to supporting this growth. We believe that the success of this project lies in effectively executing goals that are consistent with your purpose statement:

"South Texas College is a world-class institution advancing regional prosperity through education for a better quality of life in our community"

We are the fabric of your community and recognize the importance and impact of this program for the future of Rio Grande Valley's economy and education. With our prior experience at STC, we understand how to develop facilities that support this mission with virtually no learning curve. We would be honored to provide these program management services; our experience assisting your staff will expedite the initiation process and our local team is immediately available at your request.

Thank you again for this opportunity and your consideration.

Sincerely,



Gilbert Gallegos, AIA
Broaddus & Associates
Senior Vice President

Cover Letter

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3.1.1 Statement of Interest

The decision of South Texas College (STC) to select a professional firm to provide the College Construction Program Management Services is a necessary and critical step to support the administrative staff of STC through all phases of the Bond Construction Program. By adding the option for outsourcing these services, the vital step of managing projects will help improve the program delivery process. Based on the requirements set forth in the RFQ, Broaddus & Associates is strongly positioned to meet the needs of STC. This is due to the capability of our team, our knowledge and experience with the College, our portfolio of other higher education projects, and our commitment to offering the latest advances in the industry to maximize efficiency for our clients.

We understand the high expectations STC has for high-quality, yet cost-effective new and upgraded facilities. To bring your vision to reality, we are committed to deploying our services in a timely manner. Our team members have spent much of their careers on the owner's side of the project. So more than any other team, we know how it feels to bear your responsibilities in order to become a seamless addition to your staff. Our core team resides in Rio Grande Valley and intimately knows the local design and construction markets of the area. On a large program such as this, it is of utmost importance to utilize tax dollars in a manner that provides the best value, has the proper oversight and maximizes local participation an open and transparent way. Construction Management-at-Risk project delivery accomplishes the best opportunity for an open book process, with all savings returned to Owner. Broaddus & Associates has executed more Construction Management-at-Risk projects in Rio Grande Valley than any other firm, as we have relevant project experience in many nearby areas. We are familiar with the local building codes, and more importantly, STC's requirements, organization and culture. The local office was "Made in McAllen, Made in Rio Grande Valley, Made in Texas."

Additionally, Broaddus & Associates does not consider itself to be a "management" organization. We will look at every opportunity to implement innovative solutions to save time and money. All options will be explored and our track record reflects many strategies that maximize value and savings. These initiatives will pay for our fee multiple times.

Broaddus & Associates was founded in 2000 and has maintained offices in McAllen since 2001 to provide project management services to the South Texas and Border region. The office was the first regional location opened by our firm, and is centrally located to all of STC campuses. Our McAllen office has serviced a variety of regional clients by providing construction project management, planning and consulting services. A selected list of these regional clients is listed below:

- City of McAllen
- Hidalgo County
- University of Texas at Brownsville
- Texas Southmost College
- South Texas College
- Willacy County
- City of South Padre Island
- Boys & Girls Club of Edinburg
- International Boundary & Water Commission
- Brownsville Public Utility Board
- Edinburg Consolidated Independent School District
- Tropical Texas Behavioral Health System
- Texas Workforce Solutions
- City of Edinburg
- McAllen-Miller International Airport
- Rio Grande Valley State Veterans Cemetery

Our experience with the College is just one example of our working with higher education owners. These types of projects require a specialized comprehension that our firm has cultivated through working with a wide variety of university and colleges throughout the state. Our professionals understand they may need consistent interaction with several levels of university staff and be ready to deploy a variety of company resources, all with a cognizance of the budget and schedule for the project. We understand the importance of delegation and the Board of Trustees having the ultimate decision as required by State Statutes; we also know that placing agenda items for approval is an important part of a streamlined process.

Both Broaddus & Associates and our valued owner-clients are able to cite our mutual projects as examples of successful ventures to outside parties. As a result, Broaddus & Associates has a unique understanding of the high expectations of a community college, and will need no "learning curve" if selected for this opportunity. We can successfully execute a program of this scale without the expending of funds for training. When you check our references, you'll find that the board members, presidents, chief business officers, deans, facilities personnel, architects, and contractors on our projects will tell you that commitments made by Broaddus & Associates principals were commitments delivered.

Besides our capabilities and knowledge of the higher education market, our company maintains a steadfast commitment to improving service to our clients through advancing technology and process improvements. Our company recruits and retains employees who offer a variety of specialized degrees and certifications, and foster a culture where employees

STATEMENT OF INTEREST

are constantly training on the newest educational offerings in the industry. At no cost to our clients, the company initiated a certification process on Leadership in Energy and Environmental Design (LEED) that trained project managers on standards for environmentally sustainable construction. Another example is our company's commitment to Building Information Modeling (BIM), the process of generating and managing building data during its life cycle, a technology that offers vast potential savings to owners. The initiatives and policies that provide value are outlined throughout our proposal.

Finally, the facilities experience of our hands-on team provides opportunities for improvements and savings beyond what is often anticipated from large program management firms. Local staff will be interfacing with the College throughout the life of the contract, not just flown in from out-of-area for the initial interview presentation. The size of our respective organizations allows us the opportunity to have personal, senior-level involvement on each of our projects. Our team has design-sensitive, construction savvy, field-experienced professionals, along with owner-experienced project managers who know what is required for a set of contract documents to be carefully coordinated prior to commencing construction. With such experienced people, we can offer more options and better decisions. In the final analysis, that means less cost and higher quality (in a better time frame) to STC and its taxpayers.

In an industry populated by large, publicly held corporations and smaller firms with a handful of employees, Broaddus & Associates holds a surprisingly rare goal in each of its projects: that of owner satisfaction. Our firm is privately held, proactively led by its owners, financially sound, and deep in management talent. What is best for the owner/client is the right decision for our firm long-term.

3.1.2 Provide a statement about the availability and commitment of the prime firm and its principal (s) and key professionals to undertake the project.

Broaddus & Associates is committed to serving STC and achieving the schedule objectives of their projects within the timeline established. In addition, our executive team and our support team members are committed to meeting any project timeline requirements. Please note that the proposed team members are immediately available to begin work for the College upon notification.

Our core team is comprised of key individuals with proven experience in the delivery of complex design and construction projects on behalf of owners. These individuals possess the specific experience in delivering the project management services as described in your solicitation. With the team proposed in the submission, STC will have access to a high-caliber team of professionals who can immediately deliver the services required.

Supporting our core team is a comprehensive support team which will provide integrated executive and technical services throughout the entire contract. The senior executives from Broaddus & Associates will be actively engaged in providing leadership to the core team and interface with key College representatives.

The individuals that comprise the technical support team each have extensive hands-on construction project management experience on institutional and higher education projects, which will be invaluable in delivering cost-effective and able projects. These support team members will provide such support services as constructability reviews, cost estimating/analysis, schedule optimization, quality control review, and technical inspections.

3.1.3 Provide a statement describing how the prime firm and associated team members can provide benefit during the various phases of a construction program.

Our team will bring hands-on constructor expertise to the oversight of construction contractors. We will ensure the best subcontractors and trades persons are working on this project, while fully utilizing the local market. The contractor's safety program is critical, and we give it priority attention. On-site safety for construction personnel is paramount, and is especially important for the facility's daily users, students and visitors. Quality control programs are implemented, providing for inspection and testing services, mockups of major finishes and systems, and first installation inspections to minimize re-work. It is all a matter of quality: quality of construction, quality of communication, and quality of leadership required to lead and protect Owner's interest.

These specific activities can be found in section 3.2.4.



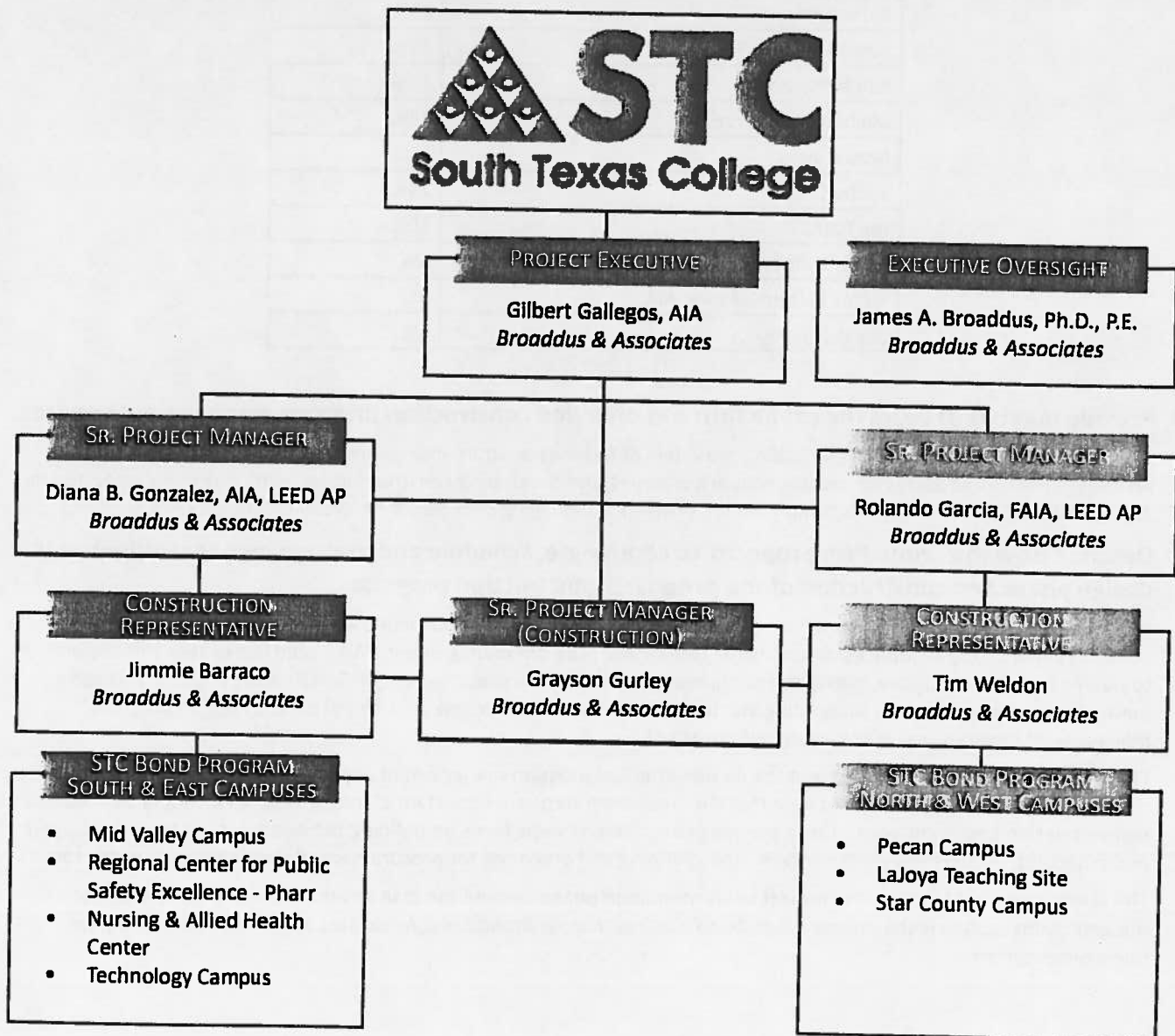
3.2.1 Provide resumes giving the experience and expertise of the principals and key professional members for the prime firm that will be involved in the project, including their experience with similar projects and the number of years with the prime firm.

Broaddus & Associates' staff provides a diverse team of reputable individuals with experience in project management services; the attached resumes at the end of this section detail the experience of these professionals.

3.2.2 Describe the proposed project assignments and lines of authority and communication for principals and key professional members of the prime firm that will be involved in the project. Indicate the estimated percent of time these individuals will be involved in the project.

The Broaddus & Associates team represents a carefully organized, tiered hierarchy comprised of executive leadership, a program management team, and a coordinating consultant support team. This proven team is structured to provide the maximum amount of resources, expertise, and depth of capabilities, while at the same time providing for a singular point of reference for STC.

Below is an organization chart that exhibits the proposed project assignments for each of the four campuses. The campuses will be divided into two divisions, South and East Campus and North and West Campuses. Each campus will be assigned a Senior Project Manager and a Construction Representative.





PRIME FIRM EXPERIENCE

Please note the percentage of time involved by each proposed team member will vary greatly based on the requirements of the project. An estimated percentage of time for all key personnel involved is provided below.

ESTIMATED PERCENT OF TIME	
Executive Management	
Dr. James Broaddus, P.E.	5%
Gilbert Gallegos, AIA	100%
Program Management Team	
Diana Bravo-Gonzalez, AIA, LEED AP	100%
Rolando Garcia, FAIA, LEED AP,	100%
Grayson Gurley	100%
Tim Weldon	100%
Coordinating Consultant Support Team	
Hilda Perez Garcia, RID, IIDA	10%
Florin Popa, AIA	5%
Rene Garza, ASTC	10%
Ben Rodriguez, P.E.	25%
Ralph Martin, P.E.	25%
Michael Donaghue, P.E.	25%
Jacque Judy	75%
Xochy Ortiz	75%
Joe Rafac	10%
Hyde Griffith, PMP, P.E.	5%
Victor Palacios, Assoc.AIA	5%
Edgar Sanchez	5%

3.2.3 Provide number of years the prime firm has provided construction program management services.

Broaddus & Associates is one of the leading providers of facilities program management, consulting and planning services in the United States for owners who are planning and developing construction projects. Since our inception in 2000, Broaddus & Associates has completed or is currently managing over \$6 billion in capital projects.

3.2.4 Describe how the prime firm proposes to coordinate, schedule and manage owner requirements, design phase and construction of the proposed construction program.

Broaddus & Associates and its team have a unique understanding of the knowledge and experience required to accomplish the scope of services described for full-service program management. We would like to take this opportunity to outline our entire program management approach, including the proactive use of Best Practices. Our philosophy, methodology, and process for integrating institutional standards into design are integral parts of the 14 program management steps we use in managing our programs.

The 14 steps outlined below represent the owner-oriented program management approach that Broaddus & Associates regularly applies. It is important to note that the first seven steps are important planning steps that should be addressed before a design firm is engaged. These pre-program planning steps focus on defining the need, setting realistic budgets and schedules, establishing design criteria, and planning and preparing for procurement of designers and contractors.

The seven steps that follow in the project implementation phase execute the plan developed in the first phase. At the end of this section is the unique set of Best Practices that set Broaddus & Associates apart from other program management firms.



Program Execution Plan

A program execution plan is developed for a set of related projects that outlines how the overall program and each project will be defined. It also provides a road map for the planning, design, construction, commissioning, occupancy, activation and closeout of each project. This plan and its impact are best illustrated by following a typical project through its phases:

PROGRAM EXECUTION PLAN

PHASE I	
I.	Program Process Development
II.	Facility Programming
III.	Total Program Budgeting and Conceptual Cost Estimating
IV.	Master Program Schedule
V.	Facilities Standards and Design Guidelines
VI.	Project Delivery Methods Selection
VII.	Document Preparation for Selection and Contracting
PHASE II	
VIII.	Designer/Construction Selection, Negotiation, and Contract Award
IX.	Schematic Design and Design Development Phases
X.	Detailed Design/Construction Working Drawings and Specs
XI.	Construction Phase Management
XII.	Commissioning, Facility Furnishing, Turnover, and Initial Operations
XIII.	Warranty Period/Operation and Maintenance
XIV.	Evaluating Project Performance and Lessons Learned

PHASE 1: PRE-PROJECT PLANNING PHASE

The first seven steps (I-VII) constitute the pre-project planning phase, and are accomplished according to a pre-project plan (PPP). The PPP is appropriate when planning is under way to fund or finance a major capital program or project and is complementary to the master planning process.

i. Program Process Development

A program's progress is affected by how it is administered, decisions are made, approvals are granted, and funds are made available. When an owner has a number of projects to be executed as an overall program, the process can become unwieldy, inadvertently delaying many projects as well as the overall program. At Broaddus & Associates, we work with the owner to map management and approval processes and reduce overall program time. This is a part of our Best Practice called schedule optimization, which improves schedule and prevents redesign, while maintaining effective control and preventing premature commitment of funds. Process mapping is a collaborative effort with key participants from the owner, which results in a well-defined process with significant checkpoints and milestones, allowing effective executive control of programs.

As the program parameters are being defined, a clear and concise structure must be clearly articulated. Team communication is invaluable to the program, and if effective can prevent schedule slippage and budget overruns. The program manager leads the team by recognizing skills that each member possesses and organizing them to solve problems, not assess blame. A highly effective team is one that communicates well and fully understands common program goals.

ii. Facility Programming

Broaddus & Associates strongly believes in the development of a comprehensive facility program before commencing design. We manage the team to identify and address issues very early in the process because this allows more proactive options for the owner, rather than addressing these issues midway through design or construction. Complete programming goes beyond developing the amount of space required by each function, and includes adjacencies,

circulation, site conditions, and utility requirements, as well as performance and prescriptive specifications.

After the program has been defined and in subsequent phases, Broaddus & Associates uses a focused, systematic approach to addressing an extensive list of issues early in the planning and design process. At this point, the use of a Best Practice referred to as the Project Definition Rating Index (PDRI), which measures quality of pre-project planning and project scope definition, is initiated. The PDRI serves as a quantitative measure of how successfully program requirements are being integrated into facility design. It is used by all the participants in the pre-project planning and implementation, where it serves not only as a quantitative predictor of project outcome, but also as a valuable communications tool for the program team. The PDRI is organized as a weighted checklist in a score sheet format. The PDRI has been used by Broaddus & Associates to produce very complete planning and design documents, improve communications, and give the team an understanding of key risks and how to mitigate them.

III. Total Program Budgeting and Conceptual Cost Estimating

From the very beginning of the overall program, the budget must have a sound basis, and the estimated costs must be accurate.

Project Budgeting - At Broaddus & Associates, we use a technique called total project budgeting to identify all costs, not just design and construction costs. Establishment of a total project budget is a document that needs to be in place from the earliest programming phase and throughout each and every project's final closeout. While many project managers focus on the hard costs of construction and design fees, there are scores of additional costs that make up a total project budget. The identification of all those costs, which include special consulting fees, furnishings and equipment, materials testing, project management, and commissioning costs, to name a few, prevents budget overruns and can even provide the opportunity to solve cost overages in a single area. The total project budget is constantly adjusted, monitored, and forecasted throughout the entire project life. This is particularly critical when performing mini-renovation projects and multiple large projects within a larger capital construction program.

Estimating - Early and accurate cost estimating is often overlooked in the excitement of developing master plans and concept designs. However, the owner will likely be disappointed without a strong emphasis on conceptual cost estimating. Broaddus & Associates uses construction-savvy, in-house construction cost estimators who know how to estimate from conceptual project plans. There is an art to conceptual estimating not possessed by most estimators who need detailed drawings and specifications to prepare an estimate. These conceptual estimates involve collaboration with owners, architects, and engineers to be as accurate as possible. The estimate breakdown becomes the foundation for the project's cost control system.

Through every step, we skillfully estimate with the available information to provide accurate cost information, so that owners can rely on it throughout the project. We will constantly monitor and review the design development for construction documents and analyze that work in light of the defined budget, balance of life-cycle costing issues, availability of materials as it has impact on schedule and cost, constructability of system or design, and availability of craftsmen to install a component of work.

This analysis is continuous and timely, and as a result, designs that are incorporated into construction will be tested for their appropriateness and value as these factors relate to design and the client's cost objectives. Our team will work directly with the architect, consultants, and estimators in development of the budget, schedule, and quality. It is through the architectural coordination meetings, shop drawing meetings, contractor pre-installation meetings and other similar sessions that these issues are addressed and resolved.

Constructability - Throughout the program, Broaddus & Associates utilizes a Best Practice referred to as constructability, the integration of construction knowledge and expertise into all program phases to improve cost-effectiveness. Research has shown that utilization of constructability in a formal program saves projects an average of 5% in total construction costs.

Cost Control/Change Management - Once the total program scope is defined, controlling cost and schedule growth through design and construction can be managed through a system that accommodates beneficial change and discourages detrimental change. This change management process, a Best Practice, helps keep the lid on non-essential changes by managing change throughout all project phases.

CHANGE MANAGEMENT SYSTEM ELEMENTS

IV. Master Program Schedule

An essential element of the pre-program plan is the master program schedule (MPS). The MPS is key to making major program and project decisions, as well as being able to deliver on commitments made. The MPS, like the conceptual cost



estimate, is prepared by construction experts experienced in types of projects proposed and the local area's construction market. Broaddus & Associates brings scheduling expertise in this early pre-program planning phase to define realistic schedules and allow the owner every opportunity to optimize completion of critical projects. Understanding schedule details and pro-actively accelerating the schedule during early stages can make significant reductions in time, without increasing program costs. The MPS is used by Broaddus & Associates as an Interactive "what-if" planning tool that allows owners to look at various scheduling options to meet their goals and objectives. MPS development will be critical for the program, as at any given time, multiple phases of work may be in progress.

Monthly Project Reports - In addition to budget and schedule reports, we prepare a monthly update of all projects, listing all open issues and an action plan to resolve them. These monthly updates provide the customer an overview of project status, as well as early warning on any problems requiring resolution. During construction, we have the ability to maintain tracking systems for RFIs and change orders. Similar to task tracking, the Broaddus & Associates team members have utilized a variety of project reporting methodologies. Past reporting submittals have required a combination of tracking tools compiled into a hardcopy report that could be posted on the Web or client server. Export capabilities of these software packages into MS Access or printed to Adobe Acrobat Writer allow for faster report generation.

The key to successful reporting is communicating critical information in a timely manner to all appropriate parties. We tailor the reporting to the owner and owner's key decision-makers.

Process Mapping/Cycle Time Reduction/Schedule Optimization - Process mapping and cycle-time reduction, a Best Practice, are used to understand the owner's management and approval system, and streamline it to take advantage of fast-track project delivery techniques. Schedule optimization, a Best Practice, is a process usually conducted in a teamwork session that considers an extensive menu of time-saving techniques applied to a specific project or scope of work. When identified early in any given project, these techniques save significant time and prevent late completion.

V. Facilities Standards and Design Guidelines

Completed programs of high quality that meet the owner's expectations begin with defined facility standards and established design guidelines. These standards and guidelines become a key part of instructions to designers, regardless of project delivery method. They can also heavily influence initial capital construction cost, as well as life-cycle operation and maintenance cost. Broaddus & Associates has experience in establishing standards for a wide variety of owners. Skillful selection of standards appropriate for the institution is very important. Buildings often cost far more in the lifetime of operation and maintenance than they do in initial construction. Standardizing equipment and systems increases the efficiency and productivity of operations and maintenance staff.

Design guidelines range from aesthetic to functional, from the architectural exterior to the mechanical room. Guidelines give architects and engineers focus from the start, so that they can design right the first time, and prevent owner disappointment upon project completion as well as time consuming and costly change directive to the design team.

VI. Project Delivery Methods Selection

A key task for each project is selection of a delivery method that is best suited for the customers' needs. While competitive bidding is the "default" option for most owners, it is important to select a delivery option based on complete information about every delivery method. Broaddus & Associates has used each form of alternative project delivery extensively, and knows the conditions under which each is most suitable. As a firm, Broaddus & Associates continues to utilize the variety of options now available to public sector owners, and the team is versed in unique nuances associated with each method.

Broaddus & Associates has provided consulting services to clients to assist them in selection of appropriate delivery method, management of procurement and contracting process utilized for each method, negotiation of contracts terms and Guaranteed Maximum Price (GMP), and post-project analysis of alternative project delivery programs.

In a complex program of projects, using a variety of delivery methods for specific projects may be the best approach. While our team does not promote one form of project delivery over another, no team can present all options to the owner with more real-world experience than ours.

VII. Document Preparation for Selection and Contracting with Designers and Constructors

Our team is knowledgeable in a variety of procurement strategies for major program work, issuing Requests for Qualifications (RFQs) and Requests for Proposals (RFPs), and guiding committees through fair, objective, and equitable selections that are appropriately documented. We recognize the value of local designers and contractors, and works to be inclusive, yet understanding when out-of-area expertise is needed. Additionally, our firm has access to all forms of



PRIME FIRM EXPERIENCE

owner-oriented design, construction, and design-build contracts that should be drafted and published in each project RFQ/RFP.

PHASE 2: PROJECT IMPLEMENTATION PLAN PHASE

Project implementation focuses on individual projects, providing a road map for design, construction, commissioning, occupancy, activation and closeout of each project. As previously described, the first seven steps constitute pre-project planning. The remaining seven steps comprise the project implementation plan phase, or actual implementation of plan prepared in the first phase. Cost and schedule control systems continue to track project budgets and schedules. Broaddus & Associates continues to use Best Practices to enhance individual project performance.

VIII. Designer/Constructor Selection, Negotiation, and Contract Award

As program managers, we will select or assist in selection of designers for direct contracting with the owner, or select them as a part of our team. While Broaddus & Associates has managed the full range of architects and engineers, including those with national and international reputations, they recognize the value and commitment of local and Historically Underutilized Businesses (HUB) for major project work. The owner's project management approach differs depending on the delivery system, selection process, and contract type.

IX. Schematic Design and Design Development Phases

Schematic and design development phases are extremely important in the project process. The ability to influence project outcome is greatest during these phases. Therefore, it is crucial to collaborate with the users, while maintaining cost and schedule control. Our team knows how to work closely with the designers to ensure program objectives are accomplished, and will provide continuing design estimates as it develops. Broaddus & Associates continues implementation of a formal constructability program throughout the design process and will continue to use the PDRI. Broaddus & Associates also has the skills to conduct detailed design reviews during this stage. Our team knows how to work with the construction manager or design-builder to determine subcontract packaging decisions for the construction phase. A critical step at the end of design development is establishment of a GMP by the construction manager or design-builder, and approval of design and price by the governing board. Our team possesses the negotiating skills and experience to successfully lead the project through this phase.

Specific activities during this phase include:

Schematic Design

- Conduct partnering and kickoff meetings with owner and all new participants (designer, construction manager, design-builder – a Best Practice)
- Communicate all pre-program planning information to designer
- Conduct weekly or biweekly design meetings between owner and designer
- Resolve issues and problems as they arise
- Start formal constructability program with a kickoff meeting and a review at each design meeting (a Best Practice)
- Prepare and/or conduct reviews of cost estimate for schematic phase; take actions to keep under control
- Conduct review of schedule (Level 2) for schematic phase
- Conduct schedule optimization session(s) (a Best Practice)
- Conduct four PDRI sessions (a Best Practice)
- Present schematic design, schedule, and cost estimate to executive or board level for preview, comment, and/or revision
- Conduct review of schematic design, which includes all disciplines
- Establish a change management system for all phases from this point on (a Best Practice)
- Ensure that master plan design elements are adhered
- Evaluate and approve all payments to architect/engineer

Design Development (DD)

- Oversee preparation of DD documents addressing architectural, structural, mechanical & electrical systems, materials, and other appropriate elements
- Continue weekly or biweekly design meetings between owner and designer
- Use checklists and guidelines to ensure designer/design-build firm is achieving required level of detail, especially in electrical and mechanical engineering areas
- Continue constructability sessions (a Best Practice)
- Develop a Level 3 schedule for the DD stage



- Conduct another schedule optimization session (a Best Practice)
- Conduct more detailed cost estimates, including an independent estimate at end of DD
- Conduct two PDR sessions (a Best Practice)
- Conduct detailed review of design at this stage, with careful attention to all disciplines
- Prepare presentation material for board approval (i.e. renderings, project summaries, costs, schedule, and total budget)
- Work with construction manager or design-builder to develop packages for subcontracts in order for designer to plan for construction document phase
- Negotiate a GMP with construction manager or design-builder for the total project
- Finalize contract with construction manager or design-builder to complete project
- Evaluate and approve all payments to architect/engineer

X. Detailed Design/Construction Working Drawings and Specifications

During this phase, our team will review the detailed design for the competitive bids, competitive sealed proposal RFP, or subcontract packages prior to the construction manager or design-builder's solicitation of subcontract bids. For selected specialty contractors, our team will look for opportunities to involve them early in the design process. This is especially important for technically complex systems, electromechanical, and plumbing systems.

- These specific activities are included during this phase:
- Oversee preparation of construction documents addressing all project elements
- Hold regularly scheduled design meetings
- Assist with governmental entities for any building/statutory reviews and other approvals
- Manage and participate in drawing reviews for completeness, constructability, and cost savings
- Coordinate, review, and evaluate all construction documents submitted by designers and subconsultants for compliance with owner's design guidelines, detailed program needs, and performance specifications before procurement of subcontractors
- Prepare construction documents' cost estimates, conduct reviews of designers' and/or construction manager's cost estimates, reconcile, and recommend action to keep cost under control
- Review construction document packages for completeness prior to bidding out by construction manager or design-builder
- Prepare program schedule and provide updates regarding any revisions to milestones, major construction elements, and conduct schedule optimization sessions (a Best Practice)
- Conduct regular team meetings with to update progress, financial status, identify new issues and action items, track and resolve issues
- Monitor use of project contingencies
- Begin planning for commissioning and startup (a Best Practice)
- Continue to manage constructability input (a Best Practice)
- Implement a change management system to control scope creep, as necessary (a Best Practice)
- Concur in award of subcontracts by construction manager or design-builder
- Monitor implementation of contracts for quality assurance and materials-testing firms

XI. Construction Phase Management

Our team will bring hands-on constructor expertise to the oversight of construction contractors. We consider heavily the subcontractors and manpower availability when reviewing proposed subcontractors with construction manager or design-builders. On-site safety for construction personnel is paramount, and is especially important for the facility's daily users and visitors. Quality control programs are monitored to ensure compliance and enforcement by all parties. Specifically included but not limited to inspection and testing services, mock-ups for major finishes and important systems, safety programs, pre-installation meetings and inspections, contract compliance, work in place non-compliance to minimize rework, ICRA and ILSA.

These specific activities are included during this phase:

- Serve as owner's point-of-contact during construction
- Participate in construction update meetings at construction sites on a weekly and as-needed basis
- Administer construction contract, general conditions, and serve as owner's representative
- Review compliance with all plans, specifications, and required terms and conditions and report status to owner
- Participate in regularly scheduled project manager update meetings
- Attend partnering update sessions as major subcontractors come onboard



PRIME FIRM EXPERIENCE

- Attend pre-construction meetings as required by contract documents
- Review major plans from construction manager or design-builder – QC plan, safety plan, environmental compliance plan, minority contracting plan, etc.
- Review and participate in construction manager's buyout of subcontract packages
- Ensure scope analysis is complete and track budget/contingency adjustments
- If a construction manager-at-risk or design-build project, track GMP savings balance and plan for its use or recapture
- Oversee commissioning and startup plan throughout completion
- Serve as spokesman for owner when job-site problems arise
- Review cost control plan and monitor use of contingency
- Monitor various project schedules to ensure overall program schedule is achieved and if necessary responsible parties take corrective action
- Monitor furnishing procurement and assist with occupancy and activation planning
- Conduct site visits to review work in place and monitor standard format report to owner with reference to facilities standards/specifications, schedules, and budgets to ensure remedial work is completed in a timely and accurate manner as to not impact schedule or cost.
- Provide field and quality assurance oversight
- Monitor coordination of shutdowns, disruptions, and issues with occupants and public
- Managing overall information flow during construction including submittals, RFIs, daily reports, photos, coordination records and meeting minutes through the Broaddus & Associates Owner InSite® Web-based project management system
- Review approved submittals and obtain owner approvals needed
- Monitor RFIs, designer responsiveness and assist where Owner's directives are required.
- Evaluate and make recommendation on change order requests
- Continue change management system into construction phase (a Best Practice)
- Analyze each potential change, estimate cost and schedule, assess its impact, and negotiate change amount; execute necessary contract modification documents
- Evaluate and approve progress payments requests
- Attend final inspections and monitor punch-list work completion

XII. Commissioning, Facility Furnishing, Turnover, and Initial Operations

Often forgotten in the project process is furnishing and equipment, training physical plant staff, and initial operation of the new facility. Our team has experience in furnishing procurement and training programs that ensure the facility maintenance and operations personnel are familiarized with new building systems.

Specific activities during this phase include:

- Oversee Commissioning Agent/Monitor compliance with Commissioning Plan
- Participate in meetings on commissioning and startup of facility
- Participate in preparation, review and approval of detailed schedule for this phase
- Monitor budget for this phase
- Participate in selection and manage the relocation into existing and new facilities
- Assist with user activation plans, i.e. mock patient intake, patient care, emergency evacuation, etc.
- Ensure all closeout requirements are satisfied (i.e. Owner's receipt of attic stock, turnover of key documents – as-built drawings, manuals, owner's training, etc.
- Our team is highly familiar with implementing formal commissioning programs using a third party commissioning agent. We believe that this approach provides a comprehensive framework for the commissioning process, and will ensure successful integration and document the testing of all major building systems.
- Project closeout is the sequence of activities required to complete all remaining project financial matters, satisfying all outstanding contractual requirements, and document project history.

XIII. Warranty Period/Operation and Maintenance

While most firms are off the job by this phase, Broaddus & Associates remains proactive in ensuring warranty obligations are met and professional interpretations are rendered as to responsibility for adjustment and repairs. Our firm does not just accept a standard one-year warranty for everything, but looks for opportunities to cost-effectively use extended warranties for critical and complex systems.

Specific activities during this phase include:

- Develop and implement a plan for warranty work



- Ensure users and facility managers are aware of any and all extended maintenance and service agreements
- Ensure compliance with post-occupancy evaluation of facility 6 months after move-in

XIV. Evaluating Project Performance and Lessons Learned

The ultimate goal is delivering a program within budget, on-time, and with a level of quality that meets or exceeds customer expectations. At Broaddus & Associates, we measure and evaluate our facilities throughout the process and in a post-occupancy mode, so that we can continuously improve projects in process, as well as apply lessons learned to future projects.

3.2.5 Provide address for location of prime firm and number of project team members located within the College district while services are provided.

McAllen Office
1100 E. Jasmine Avenue, Suite 102
McAllen, Texas 78501
Ph: 956-688-2307
Fax: 956-688-2315

Personnel in South Texas Region

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3.2.6 Describe the types of insurance coverage and limits with the prime firm currently has and additional limits the prime firm could provide if awarded the contract.

Our firm maintains the insurance coverage levels detailed below. We can solicit additional levels of coverage from our insurance representatives at Wortham Insurance upon request.

- General Liability \$1 million (single occurrence)/\$2 million (aggregate)
- Automotive \$1 million
- Umbrella \$3 million (single occurrence)/\$3 million (aggregate)
- Workers Compensation \$1 million
- Professional Liability Coverage \$1 million (single occurrence)/\$1 million (aggregate)

Education:

- Bachelor of Science in Civil Engineering, The University of Texas at Austin, Cum Laude
- Master of Science in Civil Engineering, The University of Texas at Austin
- Doctor of Philosophy, The University of Texas at Austin

Professional Registration:

- Registered Professional Engineer, 1977, Texas, No. 40952

Years with the Company

- 13 Years

James A. Broaddus, Ph.D., P.E. **Executive Oversight**

Dr. James A. Broaddus, P.E., president of Broaddus & Associates, Inc., has extensive hands-on experience in project management from the owner's perspective. Dr. Broaddus is the founder of Broaddus & Associates, an owner-oriented project and program management firm employing 120 people, with offices and projects throughout Texas, Mississippi, and in Washington, D.C. Dr. Broaddus is also chairman of FJW Construction, LLC; Broaddus Planning; and an owner of Owner InSite®, a web-based project management software. Consistently ranked by *Engineering News-Record* in the Top 50 Program Management firms in the U.S., Broaddus & Associates has in progress or completed \$7 billion in projects, primarily in healthcare, research, higher education, government, and infrastructure.

Throughout his career, Dr. Broaddus has emphasized innovative ways to improve the project process. Through research, he showed the direct correlation between pre-project planning and ultimate project results. In 1990, Dr. Broaddus served as associate director of the Construction Industry Institute (CII), funded by private industry, where he assisted member companies in implementing project management Best Practices developed through CII's research. In 1994, he became the senior University of Texas System official responsible for the statewide capital construction program of the 15 U.T. institutions, completing \$1.4 billion in a wide variety of health research, academic, athletic, and utility infrastructure projects.

During his tenure, a marked improvement in U.T. projects was made due to the strong emphasis he placed on front-end planning, project management Best Practices, and changes to Texas statutes he championed that expanded the menu of project delivery procurement options to public owners. Over the last decade, the use of design-build, construction management-at-risk, and competitive sealed proposals have replaced low-bid procurement for the billions in construction contract value awarded each year throughout Texas. In 1998, he became the first full-time CEO of the Design-Build Institute of America (DBIA) in Washington, doubling membership to 850 companies and expanding integrated design and construction options nationwide.

In 2003, Dr. Broaddus was confirmed by the U.S. Senate for a Presidential Appointment to the Board of Directors of the National Institute of Building Sciences (NIBS), an organization which reports to the President and Congress, and serves as an interface between government and the private sector. While he was Chairman of NIBS, the buildingSMART Alliance was founded to promote the rapid expansion and interoperability of Building Information Modeling (BIM). In 2011 he championed the passage of legislation in Texas promoting Public-Private Partnership (P3). He is now at the forefront of efforts to meet public facility needs through the use of private capital.

In 2014, Dr. Broaddus was appointed by Governor Rick Perry to the Small Business Advisory Task Force for Texas.

From 1970-1990, Dr. Broaddus served in 11 different assignments with the US Navy Civil Engineer Corps and the Seabees (the Navy's military construction forces), which included project management responsibilities on a wide variety of major contract design and construction work. Key positions included: (1) responsibility for the \$500 million per year engineering and construction program in the Navy's 11-state southern region, (2) major project planning and budgeting for the Chief of Naval Operations in the Pentagon, and (3) a unique assignment as Commanding Officer of the Presidential Retreat at Camp David, Maryland. In the Seabees, he directed a 700-man construction workforce overseas in the Pacific and Europe, accomplishing a wide variety of projects. In his 20-year Navy career he received seven personal decorations, including the Legion of Merit, retiring at the rank of Commander.



Education:

- Bachelor of Environmental Design, Texas A&M University

Professional Registration:

- Registered Architect, 1989, Texas, No. 12864

Years with the Company

- 13 Years

Gilbert Gallegos, AIA ***Project Executive***

Mr. Gilbert Gallegos, AIA, Senior Vice President, leads the Rio Grande Valley office of Broaddus & Associates which has provided project management services & facilities solutions for institutional owner clients since 2001. Mr. Gallegos has been responsible for over \$400 million in project work in the Rio Grande Valley over the last 13 years. No other professional in the Valley has been responsible for more work over a longer period of time than Mr. Gallegos. On all his Valley work he has served as the Project Executive closely monitoring the work of his Project Managers.

Mr. Gallegos is responsible for implementing company and contract policy, and for committing company resources, such as staff, equipment, and support to enable field assigned personnel to meet the needs of Broaddus & Associates' clients. He is also known for providing frequent customer interface at all levels to resolve issues, provide guidance, insight, and prompt timely decisions.

His experience includes all phases of work from reviewing design documents, managing project managers, resident construction managers, design-build firms, outside architects, special consultants, and testing firms to leading the implementation of alternative project delivery methods such as design-build and construction manager-at-risk.

As a senior project manager at UT OFPC, he led the project team through the entire project process. He interfaced frequently with the University of Texas System Board of Regents and executive administration. He guided his teams through all phases of the project from initial planning through design, construction, and commissioning of projects. Most notable during his University of Texas System career was the accomplishment of \$375 million of facilities for the South Texas Border Initiative and follow-on programs in his region. Due to his ability to apply construction industry Best Practices to improve project performance, his projects were well under construction by the following legislative session, which enhanced University of Texas campuses' chances for more project funding.

Throughout his career he has been a leader in the implementation of alternative project delivery methods such as design-build and construction manager-at-risk. While at the University of Texas System, he planned and executed 15 design-build projects whose durations were, on the average, 29% faster than similar design-bid-build projects.

Relevant project experience includes:

- Bond Program Management, South Texas Community College, 5 campuses – 25 projects, \$100 million, Lower Rio Grande Valley, Texas
- Bond Program Planning & Management, The University of Texas at Brownsville/Texas Southmost College, 235,000 SF, \$77.7 million, Brownsville, Texas
- Bond Program Management, Edinburg Consolidated Independent School District, 11 projects, \$112 million, Edinburg, Texas
- Santa Lucia Apartments, Mission, Texas, 168 Luxury Apartments, \$11.7 million
- Hidalgo County Courthouse Master Plan, Edinburg, Texas
- Houston Community College, Houston, Texas, Construction Management Assignment
- Expansion and Renovation, South Padre Island Convention Center, \$50,000 Sf, \$30 million, South Padre Island, Texas
- Facility Renovations, Tropical Texas Behavioral Health, 24,000 SF, \$2.6 million, Edinburg, Texas
- Health Facility, Tropical Texas Behavioral Health, 143,748 GSF, \$6.2 million, Edinburg, Texas
- Robindale Wastewater Treatment Plant, Brownsville Public Utilities Board, \$28.7 million, Brownsville, Texas
- Boys & Girls Club, Boys & Girls Clubs of Edinburg RGV, 32,237 SF, \$5 million, Edinburg, Texas
- South Texas Regional Call Center, Chase Source, 41,485 SF, \$3.5 million, Edinburg, Texas
- Hidalgo County Master Plan, Hidalgo County, Texas





Education:

Bachelor of Architecture, 1981, The University of Texas Austin, High Honors

Professional Registration:

- Registered Architect, 1989, Texas, No. 12804
- Registered Interior Designer, 1993, Texas, No. 3295
- LEED® Green Associate (GA), 2011

Years with the Company:

- 9 Years

**Diana Bravo-Gonzalez, AIA, RID, LEED® GA
Senior Project Manager**

Ms. Diana Bravo-Gonzalez, AIA, RID, serves as a senior project manager for Broaddus & Associates and is responsible to the project executive, project advisor, and owner/client for the project's budget, schedule, and quality. She interfaces with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved. Ms. Bravo-Gonzalez has extensive experience in architecture and interior design.

She is currently serving as the project manager on the \$30 million South Padre Island Center expansion and renovations projects. She recently served as the project manager for the implementation of Texas Southmost College's master plan, after the successful passing of a \$68 million bond program for the construction and renovation of its campus facilities. The campus has experienced significant growth, from 49 acres to over 300 acres, while the student body has increased to about 13,000 undergraduate and graduate degree-seeking students per semester. Projects include: an 800-seat capacity performing arts center with rehearsal halls and a full stage for music venues and opera; new east library with student study and stack spaces and internet café; classroom building housing classrooms, faculty offices, and dean's suite; upgrade to thermal energy plant; center for early childhood studies; renovation and new construction on the International Technology, Education, and Commerce Center; and renovations to the Oliveira Library.

Ms. Bravo-Gonzalez is responsible for the set up of all budgets for various projects based on the owner's dollar allocations and management of costs against these budgets. She manages and conducts all campus user group meetings for various projects with programmers. Ms. Bravo-Gonzalez directs all consultant work; advertises RFQs; interviews consultants and negotiates contracts with programmers, architects, and construction manager at risk contractors; and supervises inspectors on concurrent projects. She serves as a liaison between the owner and the design team and contractor. Ms. Bravo-Gonzalez conducts constructability reviews of architectural plans and value engineering reviews throughout the design process. She manages the owner's procurement of furniture, construction materials and equipment, and manages substantial completion and closeout of the project until owner turnover.

Relevant project experience includes:

- Bond Program Management, Texas Southmost College, Varles, \$68 million, Brownsville, Texas
- Housing Master Plan, Texas Southmost College, Brownsville, Texas
- Bond Program Management, Edinburg Consolidated Independent School District, 11 Projects, \$112 million, Edinburg, Texas
- Flores Elementary School New Classroom Building, Band Hall and Classroom Renovations, Uvalde Consolidated Independent School District, \$6 million, Uvalde, Texas
- Anthon Elementary School & Dalton Early Childhood Center Cafeteria Addition and Classroom Renovations, Uvalde Consolidated Independent School District, \$8 million, Uvalde, Texas
- Robb Elementary School Additions and Renovations, Uvalde Consolidated Independent School District, \$5 million, Uvalde, Texas
- Benson Elementary School Additions and Renovations, Uvalde Consolidated Independent School District, \$2 million, Uvalde, Texas
- Southside Maintenance and Transportation Buildings, Southside Independent School District, \$3 million, San Antonio, Texas
- Additions and Renovations at Four Campuses, Southside Independent School District, \$10 million, San Antonio, Texas
- Expansion and Renovation, South Padre Island Convention Center, \$50,000 Sf, \$30 million, South Padre Island, Texas



**Education:**

- Bachelor of Environmental Design, Texas A&M University

Professional Registration:

- Registered Architect, 1986, Texas, No. 11524
- LEED Accredited Professional

Years with the Company:

- 11 Years

Rolando Garcia, FAIA, LEED AP Senior Project Manager

Mr. Rolando Garcia, FAIA, LEED® AP, serves as a Senior Project Manager for Broaddus & Associates and is responsible to the project executive, project advisor and owner/client for the project's budget, schedule and quality. He interfaces with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved. Mr. Garcia's vast experience includes expertise in project management, planning, architecture, and related fields. Mr. Garcia most recently served as the senior project manager for the \$112 million Edinburg Consolidated ISD Bond Program. After two unsuccessful bond elections and the appointment of a Bond Oversight Committee for the current program, Mr. Garcia led the program to a swift success and completed in record time. All projects for the five elementary schools, three middle schools, and three high school fine arts facilities were completed within the budget. He accomplished this through open and proactive communications coupled with his skill in educational facilities. Prior to working on the Edinburg CISD Bond Program he served as project manager for the \$100 million expansion of South Texas Community College, which involves 25 individual projects on five separate campuses in the Rio Grande Valley. Mr. Garcia is currently working on the Tropical Texas Behavioral Outpatient Center. He is also finishing up some floor repair work for ECISD.

Prior to joining Broaddus & Associates, Mr. Garcia served as vice president for Mida, Inc., where he was responsible for production, project management, and feasibility studies for his clients. These projects included building types such as banks, clinics, museums, fire stations and libraries, as well as custom and tract homes. A major portion of Mr. Garcia's work involved remodeling and additions to existing buildings, including historical structures.

In 1994, Mr. Garcia was selected to be part of a project team headed by the firm Architects Plus of Monroe, Louisiana, for the \$60 million addition to Plaza San Agustin Mall, located in Monterrey, Mexico. In that capacity, he assisted with the translation of construction documents from English to Spanish, and through on-site project meetings implemented the use of American designs and products into the project. While working on the addition, he was contracted to develop and coordinate a \$1 million remodeling of the existing mall, including revitalizing the food courts and making the mall concourse more handicap-friendly.

Relevant project experience includes:

- Multiple Campus Bond Program Management, South Texas College, 794,000 SF, \$100 million, Rio Grande Valley, Texas
- Cooper Center for Communication Arts, South Texas College, 27,825 SF, \$6.3 million, McAllen, Texas
- Dr. Ramiro R. Casso Nursing and Allied Health Center, South Texas College, 53,000 SF, \$7.05 million, McAllen, Texas
- The Arts Center, University of Texas at Brownsville/Texas Southmost College, 57,000 SF, \$26 million, Brownsville, Texas
- Bond Program Planning & Management, The University of Texas at Brownsville/Texas Southmost College, 235,000 SF, \$77.7 million, Brownsville, Texas
- Bond Program Management, Edinburg Consolidated Independent School District, Eleven Projects, \$112 million, Edinburg, Texas
- Workforce Solutions One-Stop Center, Lower Rio Grande Valley Workforce Development, 10,000 SF, \$1 million, Rio Grande City, Texas
- County Annex Building, Starr County, 20,000 SF, \$2 million, Rio Grande City, Texas
- City of McAllen Convention Center, City of McAllen, 174,000 SF, \$54 million, McAllen, Texas
- South Texas Regional Call Center, ChaseSource, 41,485 SF, \$ 3.5 million, Edinburg, Texas
- Rio Grande Valley State Veterans Cemetery, Texas Veterans Land Board, 75 acres total/31 acres landscaped, \$8.7 million, Mission, Texas



Years with the Company:
6 Years

Grayson Gurley
Senior Project Manager

Mr. Grayson Gurley serves as a senior project manager for Broaddus & Associates and is responsible to the project executive, project advisor and owner for the project's budget, schedule and quality. He interfaces with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved. Mr. Gurley has extensive knowledge in all phases of design, development, construction, commissioning, and validation of complex projects.

At Broaddus & Associates he has also as the program manager on the \$420 million bond program management for the Lone Star College System. The program includes management of 44 projects, 11 architects, and three project managers. He managed the construction phase of the U.T. Brownsville/Texas Southmost College Bond Program and is currently in the completion phase of the Robindale Waste Water Treatment Plant.

Most recently Mr. Gurley focused on the construction of pharmaceutical and biotech research facilities and laboratories that require Agriculture Research Service (ARS), Centers for Disease Control and Prevention (CDC), and U.S. Food and Drug Administration (FDA) guideline certification.

Prior to joining Broaddus & Associates, Mr. Gurley served as a superintendent/project manager for Turner Construction Company where he was responsible for mechanical, electrical, and plumbing coordination for the Biosafety Level (BSL)-2, BSL-3 laboratories and animal laboratories.

At Gilbane Company, Mr. Gurley served as a project manager/senior general superintendent. His projects included Current Good Manufacturing Practices (cGMP) labs, BSL-2, BSL-3, and BSL-3Ag.

Relevant project experience includes:

- Bond Program Management, Lone Star College System, 1.08 million SF, \$420 million, The Woodlands, Texas
- Bond Program Management, Texas Southmost College, Varies, \$68 million, Brownsville, Texas
- Robindale Wasterwater Treatment Plant, Brownsville Public Utility Board, \$28 million, Brownsville, Texas
- Bio – Tech Animal Health Research Center, University of Georgia, 73,000 SF, \$42 million, Athens, Georgia
- University Hospital at the Medical Center Expansion, University Health System, 1.1 million SF, \$778 million, San Antonio, Texas
- Barrier Room Project, Charles River Laboratories, 50,000 SF, \$35 million, Frederick, Maryland
- North Carolina Research Campus, David Murdock/Dole Foods 300,000 SF, \$700 million, Kannapolis, North Carolina
- Asbestos Abatement, Glaxo Wellcome, 300,000 SF, \$8 million, Research Triangle Park, North Carolina
- Renovation of Main Research Facility, Energy Center and Laboratory, Glaxo Wellcome, 250,000 SF, \$125 million, Research Triangle Park, North Carolina
- Facilities Integration Team Project Renovation of Main Administration, Expansion Toxicology Laboratory and Offices, Glaxo Wellcome, 180,000 SF, Research Triangle Park, North Carolina
- New Research Development and Administration Facility, Glaxo Wellcome, 450,000 SF, \$680 million, Research Triangle Park, North Carolina



Education:

- Bachelor of Business Administration, UT Pan American

Years with the Company:

- 6 Years

Tim Weldon
Construction Representative

Mr. Tim Weldon serves as a construction representative for Broaddus & Associates and is responsible to the project manager for all field matters related to construction activities, including documenting contract and code compliance. Mr. Weldon's field experience is invaluable during site inspections and the preparation of field reports. Mr. Weldon brings experience accumulated since 1998 in a variety of roles within the construction industry. He is currently serving as the construction representative on the Tropical Texas Behavioral Health Outpatient Center and the International Boundary & Water Commission Administration building.

He most recently served as the construction representative on the \$116 million Edinburg CISD Bond Program. Prior to that, Mr. Weldon was the construction representative for the \$77 million University of Texas Brownsville/Texas Southmost College Bond Program. The program included construction of the east library, large classroom building, thermal plant expansion, and the Center for Early Childhood Development. Mr. Weldon's responsibilities included: submittal review and maintenance of logs, schedule, pay application, as-built and RFI reviews, daily field inspections, and maintenance of a specialty inspection log of all outsourced inspections, such as concrete strengths, welding inspections, soil densities, and testing and balancing reports as well as checking these reports against submittals, specifications, plans and RFI comments for conformance. Mr. Weldon was also involved in the design phase.

Prior to joining Broaddus & Associates, Mr. Weldon served as an estimator for SpawGlass Contractors, Inc., in Harlingen, Texas. His estimating projects included concealed and hard bids, design-build and construction manager-at-risk. Mr. Weldon assisted in estimating the Brownsville Doctor's Hospital valued at approximately \$12 million, as well as the Fort Hood Barracks valued at \$30 million.

As superintendent for Scoggins Construction Co., Inc., he was involved in the \$6.5 million additions and renovations projects for Wilson Elementary School, which included the new library, Boys and Girls Club, cafeteria expansion, roofing repairs, and restroom and classroom renovations. Mr. Weldon also acted as punch coordinator on multiple projects including Mercedes Junior High and middle school new classrooms and the Mercedes Independent School District central cafeteria. He also served as project manager/superintendent for Weldon Construction Services, Inc. In this position, he was responsible for the construction of over 30 cell tower sites valued at approximately \$100,000 each.

Relevant project experience includes:

- Bond Program Management, University of Texas Brownsville/Texas Southmost College, 235,000 SF, \$77 million, Brownsville, Texas
- Classroom Building and Thermal Plant Expansion, Texas State University-San Marcos, \$25 million, San Marcos, Texas
- 2008 Bond Program Management, Edinburg Consolidated Independent School District, 750,000 SF, \$112 million, Edinburg, Texas
- 2008 Bond Program: Group A – Elementary Schools, Edinburg Consolidated Independent School District, 284,000 SF, \$33.8 million, Edinburg, Texas
- 2008 Bond Program: Group C – Fine Arts Facilities, Edinburg Consolidated Independent School District, 55,500 SF, \$18.4 million, Edinburg, Texas
- Boys & Girls Club, Boys & Girls Clubs of Edinburg RGV, 32,237 SF, \$ 5 million, Edinburg, Texas
- South Texas Regional Call Center, Chase Source, 41,485 SF, \$ 3.5 million, Edinburg, Texas
- Hidalgo County Master Plan, Hidalgo County, Texas



Education:

- El Centro Junior College
- Allen Military Academy
- Jesuit Preparatory College

Years with the Company:

- 6 Years

Jim Barraco
Construction Representative

Mr. Jimmie J. Barraco serves as a senior construction representative for Broaddus & Associates and is responsible to the project manager for all field matters related to construction activities, including documenting contract and code compliance. Mr. Barraco's field experience is invaluable during site inspections and the preparation of field reports.

Mr. Barraco most recently completed construction inspection services for Houston Community College. He assisted in reviewing the contractor's payment requests and submittals. Mr. Barraco conducted frequent site visits to ensure that project activities were progressing per contract and assisted in problem resolution.

Prior to joining Broaddus & Associates, Mr. Barraco served as resident construction manager/construction inspector for the University of Texas System Office of Facilities Planning and Construction in Austin, Texas, where he was responsible for managing all aspects of field construction management processes; including: construction observation inspections to ensure conformance with project documents; monitoring compliance with state and federal regulations; maintaining project documentation, including change orders; managing requests for information; submittal and shop drawing approvals; providing daily field observation reports; and managing consultants through the project commissioning phase. Mr. Barraco has focused his career on providing comprehensive onsite construction supervision on projects ranging from small site work projects to some of the most complex in Texas.

As senior construction representative he provided daily on site documentation and inspection services for two apartment complexes. He reported to the owners and coordinated with architects, engineers, and code enforcement officials for compliance to the documents and specifications.

One complex was a 256 unit complex comprised of 11 residence buildings, clubhouse, swimming and lounging areas. This was constructed over a 15 month period and was situated on a 12 acre site.

Another complex was a 300 unit complex based on the same design as the previous units. This consisted of 15 buildings including clubhouse, pool and separate garages for occupants. This was situated on 16 acres and constructed over 17 months. The design included input, site preparations, dirt work, underground utilities, concrete pours, framing, and finishes for complete turnover.

Relevant project experience includes:

- Felix Fraga Academic Campus, Houston Community College, \$1.6 million, 5,400 SF, Houston, Texas
- Southeast College Workforce 3rd Floor Buildout, Houston Community College, \$1.3 million, 21,200 SF, Houston, Texas
- Southeast College Workforce Parking Garage Lab, Houston Community College, \$1.4 million, 7,000 SF, Houston College
- San Jacinto Student Dormitory, The University of Texas at Austin, 300 rooms, \$55 million, Austin, Texas
- Science Park—Research Division, The University of Texas MD Anderson Cancer Center, 20,000 SF, \$15 million, Smithville, Texas
- Comparative Medicine and Research Building and Vivarium, The University of Texas MD Anderson Cancer Center, 50,000 SF, \$50 million, Bastrop, Texas
- Health Professional Education Building, Texas A&M Health Science Center, Texas A&M University System, 138,000 SF, \$50 million, Bryan, Texas



**Education:**

- Construction Engineering, Arizona State University

Years with the Company:

- 6 Years

Jacque Judy **Estimator**

Mr. Jacque Judy serves as Cost Estimator for Broaddus & Associates. He provides estimates for projects in a variety of stages, meets with the owner to ensure that their needs are met, establishes budgets with owners/clients, develops project scopes, procures construction contracts, and coordinates design team efforts with owner/clients guidelines. He has the unique ability to provide conceptual estimates during planning and early design with great accuracy & reliability.

He leads our approach to the technical services process to accurately establish and maintain project budgets, the development of project design within budget restraints, and supervises the timely completion of all pre-construction activities. During final bid preparation, he works closely with the project team to maximize participation by local, qualified trade contractors and facilitates an orderly transfer to field operations. He will continue to stay involved with the project as necessary throughout the course of construction.

Mr. Judy's field experience is invaluable during site inspections and the preparation of field reports. Prior to joining Broaddus and Associates, Mr. Judy was responsible for authoring the City of Chicago Design Build Program as well as performing business management functions, for The Alter Group, a full-service real estate development design build construction firm specializing in national commercial/industrial projects.

While at the Alter Group, Mr. Judy successfully procured construction contracts, negotiated and purchased trade and design service agreements for design build delivery. During this period he coordinated business strategies for client/owners to ensure proper and timely construction delivery systems.

Relevant project experience includes:

- College of Nursing Academic and Student Services Building, MedCentral College, 50,000 SF, \$10M, Mansfield, Ohio
- Texas State University-San Marcos Bobcat Stadium Expansion Master Plan, 46,00 SF, \$17.2M San Marcos, Texas
- Texas State University-San Marcos Undergraduate Academic Program, Texas State University System, 124,358 SF, \$47.7M, San Marcos, Texas
- Dallas Campus Building 2, The University of North Texas, 100,000 SF, Dallas, Texas
- East Campus Master Plan, Dallas Baptist University, 630 Acres, Dallas, Texas
- Mahler Center Retrofit, Dallas Baptist University, 4,000 SF, Dallas, Texas
- New Academic Center, Dallas Baptist University, 11,190 SF, Hurst, Texas
- Williamsburg Village Townhomes, Dallas Baptist University, 54,000 SF, Dallas, Texas
- Spence Residence Hall Retrofit, Dallas Baptist University, 130,000 SF, Dallas, Texas
- Zapata Higher Education Center and Advanced Technology Center, Zapata County, 15,000 SF, \$2.1M, Zapata, Texas
- Classroom & Washroom Renovations and New Cafetorium, Dilley Independent School District, 21,200 SF, \$3.2M, Dilley, Texas
- Classroom & Washroom Renovations, Rosebud Lott Independent School District, 65,000 SF, \$4.5M, Rosebud, Texas
- High School Science Lab Addition, Somerset ISD, 6,500 SF, \$1.7M, Somerset, Texas
- University Hospital at the Medical Center Expansion, University Health System, 1.1 million SF, \$778M, San Antonio, Texas





PRIME FIRM EXPERIENCE

Education:

Bachelor of Science,
Business Management,
Auburn University

Years with the Company:

- 9 Years

Joe Rafac **Procurement Strategies**

Mr. Joseph Rafac serves as a cost control/project strategy specialist for Broaddus & Associates and is responsible for and is responsible to the project executive, project advisor, and owner for the project's budget, schedule, and quality. He interfaces with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved. He is currently serving as the project manager on the Brownsville Public Utility Wastewater Treatment Center.

Mr. Rafac has proven success in efficiency improvement, cost reduction, and design innovation with the ability to impact the bottom line. He is recognized for his ability to motivate people, engineering, technical, and production groups. He possesses a comprehensive knowledge of engineering disciplines including mechanical, hydraulic, structural, pneumatic, and electrical. He also possess in-depth understanding of manufacturing processing and principles, including welding, fabrication, machining, assembly, plant and facilities construction, plastics, tool and die, and mold making.

Prior to joining Broaddus & Associates, Mr. Rafac served as the general manager for Neoplan USA Corporation, where he was responsible for managing the completion of the production facilities construction and installations. When the decision was made to shut this plant down, he was asked to create a new department within the engineering organization as the manager of project engineering. He personally managed the New Jersey Transit contract, while developing and building a project engineering department. The New Jersey Transit project was the first to use a project engineering approach at Neoplan. It was also the most successful production launch of a transit bus contract in the company's history.

At Airshield Corporation, Mr. Rafac served as vice president of engineering where he managed all engineering activities including design support for customers, welding, fixture design and manufacturing, tool fabrication, and design for all molded products. He developed and patented new product designs and processes, including vehicle aerodynamic systems to increase fuel efficiency, a new low-cost molding process, and new tooling technology.

Relevant project experience includes:

- Multiple Campus Bond Program Management, South Texas College, 794,000 SF, \$100 million, Rio Grande Valley, Texas
- Cooper Center for Communication Arts, South Texas College, 27,825 SF, \$6.3 million, McAllen, Texas
- Dr. Ramiro R. Casso Nursing and Allied Health Center, South Texas College, 53,000 SF, \$7.05 million, McAllen, Texas
- Robindale Wastewater Treatment Plant, Brownsville Public Utilities Board, \$28.8 million, Brownsville, Texas
- New Main Library, City of McAllen, 128,000 SF, \$22 million, McAllen, Texas
- 2008 Bond Program Management, Edinburg Consolidated Independent School District, 750,000 SF, \$112 million, Edinburg, Texas
- Robert Vela High School New Football Field with Competition Running Track, Softball Field, Baseball Field, Practice Fields, and
- Two-Gymnasium Remodel, Edinburg Consolidated Independent School District, 239,000 SF, \$9.7 million, Edinburg, Texas



**Education:**

- Bachelor of Science in Civil Engineering, The Citadel – The Military College of South Carolina
- Masters Certificate in Project Management, George Washington University
- Certified Program Instructor – Master Certificate In Project Management, Boston University/ Southern Methodist University
- Master of Business Administration in Project Management, University of Athabasca

Professional Registration:

- Registered Professional Engineer, Texas, No. 99607
- Registered Professional Engineer, North Carolina, No. 025517
- Certified Project Management Professional, No. 14881

Years with the Company:

- 9 Years

Hyde Griffith, MBA-PM, P.E., PMP BIM Specialist

Mr. Griffith serves as a Building Information Modeling (BIM) specialist for Broaddus & Associates. In his role as BIM Specialist, Mr. Griffith oversees all aspects of the design to ensure the project will achieve three deliverables that contribute to the overall BIM strategy, should the client choose to use BIM. The deliverables include BIM Data Model, Constructability Model, and CMMS input (an import from BIM for O&M purposes). Each deliverable has a scope and outcome target. Mr. Griffith's supervision ensures the project team cooperates and collaborates to achieve the goals for the project.

Prior to joining Broaddus & Associates, Mr. Griffith served in the Project Management Office (PMO) responsible for overall delivery projects within The University of Texas Health Science Center at Houston. Among his projects were the 12-phase, \$12 million reconstruction effort of the Texas Medical School related to FEMA flood mitigation, and a new \$20 million, 250,000 square foot student housing complex with 10 buildings and a parking garage. He was also responsible for a 7 Tesla MRI/NMR imaging center valued at \$4 million, including equipment and build out.

Mr. Griffith spent ten years of his career working in the electric power industry. He served as Director of Business Development for Framatome ANP DE&S (Duke Engineering & Services was divested by Duke Energy on 5/1/02) between 2000-2002, where he provided communications and coordination for various Duke-affiliated companies and was responsible for administering the company's Master Services Agreement. Prior to Duke, he was a Technical Services Manager for Armstrong Service, Inc., where he managed overall project delivery and technical data integration, provided project execution, logistics and programmatic infrastructure and support, developed detailed project plans, and established budgets and schedules for industrial projects.

Mr. Griffith was also responsible for developing centralized and deployable project delivery strategies, including deploying engineer, procure, and construct systems to remote locations. He was responsible for establishing and maintaining the ASI operating and quality program and developing a phased approach to ISO-9001 implementation/certification for Armstrong. He provided commercial oversight of disciplines involved in contracted projects, participated in the project proposal development process and maintained technical and engineering baseline design documents, including negotiating and executing contract terms, scopes, changes, and deliverables.

Relevant project experience includes:

- Galveston National Lab, University of Texas Medical Branch, 174,000 SF, \$173M, Galveston, Texas
- Texas A&M Health Science Center, Texas A&M University System, 282,000 SF, 4 million SF, \$131M, Bryan, Texas
- Reconstruction of the Texas Medical School, University of Texas Health Science Center at Houston, \$12M, Houston, Texas
- New Student Housing Complex, University of Texas Health Science Center at Houston, 250,000 SF, \$20M, Houston, Texas
- 7 Tesla MRI/NMR Imaging Center, University of Texas Health Science Center at Houston, \$4M, Houston, Texas





PRIME FIRM EXPERIENCE

Education:

- Master In Art in Sustainable Design, 2015 (expected), Minneapolis College of Art and Design.
- Bachelor of Architecture, (professional) 1994, UAC, México

Years with the Company:

- 1 Year

Victor Palacios **BIM Standards**

Mr. Victor Palacios serves as BIM manager for Broaddus & Associates South Texas region, in the Rio Grande Valley office. He will assist with all aspects of the design to ensure the project will achieve three deliverables that contribute to the overall BIM strategy, should the client choose to use BIM. The deliverables include BIM Data Model, Constructability Model, and CMMS Input (an import from BIM for O&M purposes). Each deliverable has a scope and outcome target.

Prior to joining Broaddus & Associates, he was a Project Manager at Frank P. Key & Associates Architects located within the city of McAllen, Texas. He has collaborated with other highly driven designers on multiple projects among the Rio Grande Valley. He has assisted on the delivery on numerous projects for the region, which includes renovation of a Fiat & Chrysler Dodge Dealership, Weslaco, GSA Building/Site Improvements, McAllen, TX, US Marshal Service Cellblock renovation, also the US Federal Courthouse site security improvements.

Relevant project experience includes:

- Santa Lucia Luxury Apartment Complex, \$15 million, Mission, Texas
- Conceptual Apartment Complex (Rio Grande Mission Style), Rio Grande City, Texas
- Conceptual Apartment Complex (Modern, Sustainable Arch), Edinburg, Texas
- Conceptual Apartment Complex (Contemporary Motif), Mission, Texas



**Education:**

- Master of Architecture, 2009, University of Texas at San Antonio

Years with the Company:

- 1 Year

Edgar Sanchez
BIM Standards

Mr. Edgar Sanchez serves as BIM manager for Broaddus & Associates South Texas region, in the Rio Grande Valley office. Broaddus & Associates is one of the principal providers of facilities program management, consulting and planning services in the United States. They have also completed or is currently managing over \$6 billion in capital projects as of the year 2000. Mr. Sanchez is part of an exceptionally experienced staff that delivers successful projects with superior results.

Mr. Sanchez is responsible for implementing design development drawing to full completed construction documents. He is also known for developing conception proposal, as well as schematic drawings for competitions. His experience includes all phases of work from reviewing documents, researching in local building codes and to accommodate unique and standard construction plans. He is also known for managing and collaborating with technical teams to evolve projects: provide in depth research, technical specification, and exciting architectural solutions while serving as a client representative regarding project priorities and design concepts. As well as adapting to client's needs, demonstrating talents to effectively translate client's ideas to higher esthetic while improving functional outcomes.

Prior to joining Broaddus & Associates, he was an Architectural Intern at Frank P. Key & Associates Architects located within the city of McAllen, Texas. He has collaborated with others highly driven designers on multiple projects among the Rio Grande Valley. He has assisted on the delivery on numerous projects for the region, which includes renovation of a Fiat & Chrysler Dodge Dealership, Weslaco, TX, GSA Building/Site Improvements, McAllen, TX, Clark Knapp Honda, In Pharr, TX.

Relevant project experience includes:

- Santa Lucia Luxury Apartment Complex, \$15 million, Mission, Texas
- Conceptual Apartment Complex (Rio Grande Mission Style), Rio Grande City, Texas
- Conceptual Apartment Complex (Modern, Sustainable Arch), Edinburg, Texas
- Conceptual Apartment Complex (Contemporary Motif), Mission, Texas



Education:

Bachelor of Science, Interior Design, University of Incarnate Word

Professional Registration:

- Texas Board of Architectural Examiners #8607 Interior Designer

Years with HPG:

- 24 Years

Hilda Perez Garcia, RID, IIDA
Interior Design & FF&E

Ms. Garcia has been in the Interiors Field for 24 years implementing space planning, Interior finish out, FF&E and Interior Architecture. Her diversity in Design projects includes higher education, residential, commercial and healthcare. Ms. Garcia was the first Interior Designer in San Antonio to receive her accreditation in Evidence-Based Design.

Relevant project experience includes:

- Texas A&M San Antonio; \$4 million budget for FF& E package for Central Academic Building. Provided Space Programming /Project Management/ Specification of Furniture according to campus standards and guidelines.
- Alamo Colleges; Chancellor's and Vice Chancellor's Office Suite Renovation, Sheridan Complex; Lead Interior Designer. Project involved total renovation of office suites. Provided Programming/Space Planning/FF&E.
- Alamo Colleges; St. Phillips College, Southwest Campus – Building 3020; Interior Designer. Provided FF&E and finish-out for the major renovations of Building 3020 on the Southwest Campus. Project includes interior renovations and addition of a new floor.
- Alamo Colleges; Center of Excellence, Bioenergy, Chemical Energy, Fluid Mechanical, Atmospheric Dynamic & Alternative Energy Laboratories; Provided Programming/Interior Design/Project Management/FF&E
- San Antonio College; Executive Office Suite Renovation. Fletcher Administration Building; Provided Programming/ Interior Design/Project Management/FF&E
- West Texas A&M University, Underclassman Residence Hall, Canyon TX; provided Interior Design/Project Management/FF&E
- St. Philip's College, Green Room; Provided interior Design/ Project Management/ FF&E
- St. Philip's College Southwest Campus Library; Renovation of existing space. Provided Programming/Space Planning/FF&E/ Project Management.
- SAISD Life Strides Unit-Breckenridge High School Campus; Interior Designer. Met with Department Heads to determine needs of the Special Education Life Skills Units. Designed unit according to the special needs and TEA Standards.
- SAISD Bond Issues – Assessment of all Schools for SAISD for Bond Issue; Project Manager. Evaluated all High School Campuses for Assessment to determine condition of facilities. Benchmarked all Campuses according to TEA Standards to determine whether to renovate or build new. Collected data and presented to School Board.
- Devine Independent School District; interior Designer/Project Manager. Established building committee for Assessing Campuses for Bond Issue. Schematic Designs. Assessed all campuses according to TEA Standards and student population to determine whether to renovate or build new.
- Crystal ISD – Assessment of Campuses. Schematic Design and Presented to School Board for Bond Issue; Interior Designer/Project Manager. Provided assessment of campuses and Schematic Design. Presented to School for Bond Issue.



Education:

- Bachelor of Architecture, Texas Tech University

Professional Registration:

- Registered Architect, Texas #19964

Years with HPG:

- 9 Years

**Florin Popa, AIA
BIM Programming**

Mr. Popa has over 23 years experience in the architectural and construction industry, and has gained expertise in the following areas: information management, LEED Design, project and cost control, program analysis, facility management, asset inventory documentation, program management, design charrette facilitation, and construction management related services on a wide variety of project types for both public institutions and private organizations.

As Chief Executive Officer of pbGROUP, LLC, he is responsible for setting the firm's strategy, developing and managing senior staff, and setting the culture of the company. He leads the firm's efforts associated with all aspects of Building Information Modeling and Management and IPD facilitation. His focus is on the rapid advancement of technology and its integration into the life-cycle BIM process and facilitation. Additionally, Florin contributes and focuses on a superior level of detail, accuracy, and quality for each and every one of the firm's clients, and with this instills assurance and confidence that each project will be a success.

Over his professional career in the design and construction industry, he has completed significant projects and programs for Higher Education Systems, K-12 School Districts, Retail/Commercial (Corporate) Clients, Judicial Systems, Financial Institutions, Religious Facilities, High-End Custom Homes, the Federal Government, as well as County and City Governments. Florin's experience includes projects ranging in size from 1,500 sf to 450,000 sf, located throughout the State of Texas and across the United States.

Florin is a licensed architect, with vast experience incorporating innovative sustainable design concepts and energy efficiency in the designs and projects he has managed and directed.

Relevant project experience includes:

- Gut-out and Renovation of the Math, Science & Alternative Energy Center of Excellence - Alamo Colleges, San Antonio, TX - 2009 (Approx. 62,000 SF and \$10.5 million)
- Office Suite Renovations and Remodel - San Antonio College, Fletcher Building 3rd Floor, San Antonio, TX - 2009 (Approx. 8,000 SF and \$1.2 million)
- Renovation of the Killen Community Education & Service Center - Alamo Colleges, San Antonio, TX - 2009 (Approx. 5,000 SF and \$750K)
- President's Executive Office Suite Renovation - St. Philip's College, San Antonio, TX - 2009 (Approx. 24,000 SF and \$4.5 million)
- Office Finish-out - Friedrich Air Conditioning Co., San Antonio, TX - 2009 (Approx 15,000 SF and \$1.2 million)
- Fire Station No. 50 - City of San Antonio, TX - 2009 (12,669 SF 3.6 million)
- McNair Middle School - Southwest ISD, San Antonio, TX - 2008 (Approx. 172,000 SF \$32.1 million)
- Bulverde Green Elementary School - North East ISD, San Antonio, TX - 2007 Bond (122,634 SF and \$27.1 million)
- Demolition, Additions and Renovations to Boerne HS (Greyhound) - Boerne ISD, Boerne, TX - 2009 (28 million)
- Boerne-Samuel V. Champion HS - Boerne ISD, Boerne, TX - 2008 (290,000 SF and \$47.1 million)
- Harris Middle School - North East ISD, San Antonio, TX - 2006 (198,362 SF and \$27.1 million)
- Lopez Middle School - North East ISD, San Antonio, TX - 2006 (198,362 SF and \$28.7 million)
- Byron Steele High School - Schertz Cibola Universal City ISD, Schertz, TX - 2005 (334,400 SF and \$32.5 million)





Education:

- University of the Incarnate Word, Bachelor of Arts, Theatre and Design, San Antonio, Texas
- University of Oregon, Graduate Teaching Fellow

Professional Registration:

- American Society of Theatre Consultants
- United States Institute for Theatre Technology
- Texas Educational Theatre Association

Years with HMG & Associates:

- 14 Years

Rene Garza, ASTC
Data, Voice, Acoustical

Relevant project experience includes:

- Southern Methodist University—Dr. Bob Smith Health Center | Dallas, Texas
- St. Phillips College— Center For Health Professionals Renovations | San Antonio, Texas
- University Of Texas at Dallas—Student Union | Dallas, Texas
- Texas A&M San Antonio – Central Academic Building & Patriots Casa | San Antonio, Texas
- Texas Christian University – Brown-Lupton University Student Union | Fort Worth, Texas
- University Of Texas, Pan American – Jet Propulsion Laboratory | Edinburg, Texas
- Texas A&M University - Texas A&M, Jones Auditorium Renovation, Kingsville, Texas
- Southern Methodist University – Umphrey Lee Center | Dallas, Texas
- University Of Texas – LBJ Library | Austin, Texas
- Trinity University – Ruth Taylor Fine Arts Building | San Antonio, Texas
- Northeast Lakeview Campus Fine Arts Building | San Antonio, Texas
- Palo Alto Campus Fine Arts Building | San Antonio, Texas
- San Jacinto College District – North Fine Arts Building | Houston, Texas
- Cy Fair College Center For The Performing Arts | Cypress-Fairbanks, Texas
- San Jacinto College District – South Fine Arts Building | Houston, Texas
- Oblate School of Theology | San Antonio, Texas
- Texas Wesleyan University – Nicholas Martin Performance Hall | Fort Worth, Texas
- Texas A&M International University – Center for Fine and Performing Art | Laredo, Texas
- Texas Wesleyan University – Ann Waggoner Hall Renovation | Fort Worth, Texas
- Alamo Stadium and Convocation Center Renovation | San Antonio, Texas
- West Texas A&M University – Sybil B. Harrington Fine Arts Complex | Canyon, Texas
- St. Phillips College— Watson Theatre Renovations | San Antonio, Texas



**Education:**

- Bachelor of Science, Mechanical Systems Technology, University of Houston

Professional Registration:

- Professional Engineer, Texas No. 87099
- LEED Accredited Professional

Years with HMG & Associates:

- 20 Years

**Benigno, "Ben" Rodriguez, P.E., LEED AP
Thermal and Mechanical Engineer**

Mr. Rodriguez has over 30 years experience (20 with HMG) in mechanical engineering and is responsible for the management, design, and coordination of mechanical and electrical systems on all projects produced in the San Antonio office. He is directly involved in the design of mechanical systems for projects and continues to provide project coordination, specification preparation and construction administration in addition to his management and business development responsibilities. Mr. Rodriguez has designed the mechanical systems for over 400 projects of varying size and complexity with costs ranging from \$100,000 to \$40,000,000.

Mr. Rodriguez's speciality areas include: HVAC design and project management for commercial office buildings, industrial production buildings and ambulatory healthcare facilities, central chiller plans, central HVAC systems including VAV, multi-zone, ISO5 clean rooms and bio-safety laboratories (BSL-3).

Relevant project experience includes:

- UT PAN AM EDUCATION COMPLEX, Edinburg TX, Renovation of a 12,000 sf 2-story office building; a 26,000 sf administration building, and design/construction of a new 78,000 sf 4-story general classroom building.
- UT PAN AM ACADEMIC AND ADMINISTRATION BUILDING ADDITION, Edinburg TX, Three story, 39,426 sf housing meeting/conference spaces, administrative offices, student lounge and private study rooms.
- UT Brownsville, Brownsville TX, 50,000 sf Student Union housing offices, banquet facilities, student café and recreation area.
- UT Brownsville, Brownsville TX, New two-story 149,000 sf building with teaching laboratories, lecture halls, offices and classrooms. Chilled water is supplied by the campus loop. Heating water for labs is supplied by addition of two boilers with dedicated pumps.
- UT at Dallas – Math, Science, and Engineering Learning Center, Dallas TX, New three-story, 74,000 sf facility housing Mechanics lab, Physics lab, Molecular Biology labs, Organic Chemistry labs, and a 300 and 150-person lecture hall, respectively.
- UT San Antonio, - Engineering Biotechnology Building, San Antonio TX, 57,000 sf Engineering of research laboratories. The HVAC system consists of 100% outside air system on each floor and complete DDC controls for independent laboratory ventilation control.



**Education:**

Bachelor of Science
Electrical Engineering, Texas
A & M University

Professional Registration:

- Professional Engineer, Texas
No. 28858
- LEED Accredited
Professional

Years with HMG &**Associates:**

- 20 Years

**Ralph Martin, P.E.
Senior Electrical Engineer**

Mr. Martin has over 46 years experience as a Project Engineer, Project Manager and Electrical Division Manager including extensive design on electrical studies and systems, energy audits and master planning of electrical distribution systems for a wide verity of clients. This experience has included computer installations, building renovations and additions and electrical site planning. His responsibilities have included the review of appearance, coordination, accuracy, and adequacy of drawings, calculations, specifications, cost estimates and reports, assuring the design satisfies and confirms to the Owner's requirements and code criteria.

Relevant project experience includes:

- U.T. at Dallas – Math, Science, and Engineering Learning Center, Dallas TX , New three-story, 74,000 SF facility housing Mechanics lab, Physics lab, Molecular Biology labs, Organic Chemistry labs, and a 300 and 150-person lecture hall, respectively.
- U.T. Pan AM Academic and Administration Building Addition, Edinburg TX , Three story, 39,426 sf housing meeting/conference spaces, administrative offices, student lounge and private study rooms.
- School Districts Central and South TX, Renovation and new construction engineering and design for 32 school districts throughout Central and South Texas. Projects included new classrooms, gymnasiums, administrative offices, athletic facilities and multi-use spaces.
- Via Metropolitan Transit IDiQ, San Antonio, TX, HMG has been involved in more than 85 different MEP Engineering task orders over 10 years. Project have included park and rides, Annex and Administration Building renovations, and upgrades to their IT and Maintenance Shops.
- American National Insurance Company, Galveston, TX Mr. Martin was the electrical engineer for this 25 story corporate office building. The facility has its central plant and electrical service vault located on top of the building due to the concern for possible hurricane flooding in the lowest level of the building. Electrical bus risers are provided from the penthouse switchgear room to the second floor with 277/480-volt electrical panelboards and dry type transformers served by fused switch bus plugs at rack level of the building.



**Education:**

- Bachelor of Science in Engineering, The University of Houston
- Master of Engineering, The University of Texas at Austin

Professional Registration:

- Professional Engineer, Texas, No. 44610

Years with Maritech Engineering, Inc.:

- 26 Years

**Michael Donoghue, P.E.
Structural Engineer**

Mr. C. Michael Donoghue, P.E., a registered professional engineer and structural engineering consultant to Broaddus & Associates, provides structural design consulting for owner clients. His professional career began in 1972. He has provided structural consulting services to Broaddus & Associates on several projects, including the Williamson County Criminal Justice Complex in Georgetown, Texas. Mr. Donoghue has provided Structural and Marine Engineering Services for conventional terrestrial, waterfront, and floating structures throughout the United States and the world. As a principal of the firm, Mr. Donoghue's activities range from statistical site analysis, design, and planning of marine and waterfront facilities and wave attenuation systems to structural design of terrestrial multi-story and long-span structures and computer programming. In addition to his design work, Mr. Donoghue is currently serving on the City of Austin Building Code review committee and as a certified Wind Storm Inspector for the Texas Department of Insurance.

For five years, Mr. Donoghue was the Vice President of Porter-Donoghue Consulting Engineers, Inc. in Austin, Texas. He was responsible for design and supervision of structural projects and client development efforts for the firm on projects throughout Texas. In addition, Mr. Donoghue developed analytical methods and experimental programs related to the design of innovative floating wave attenuation systems for projects throughout the United States and numerous locations abroad.

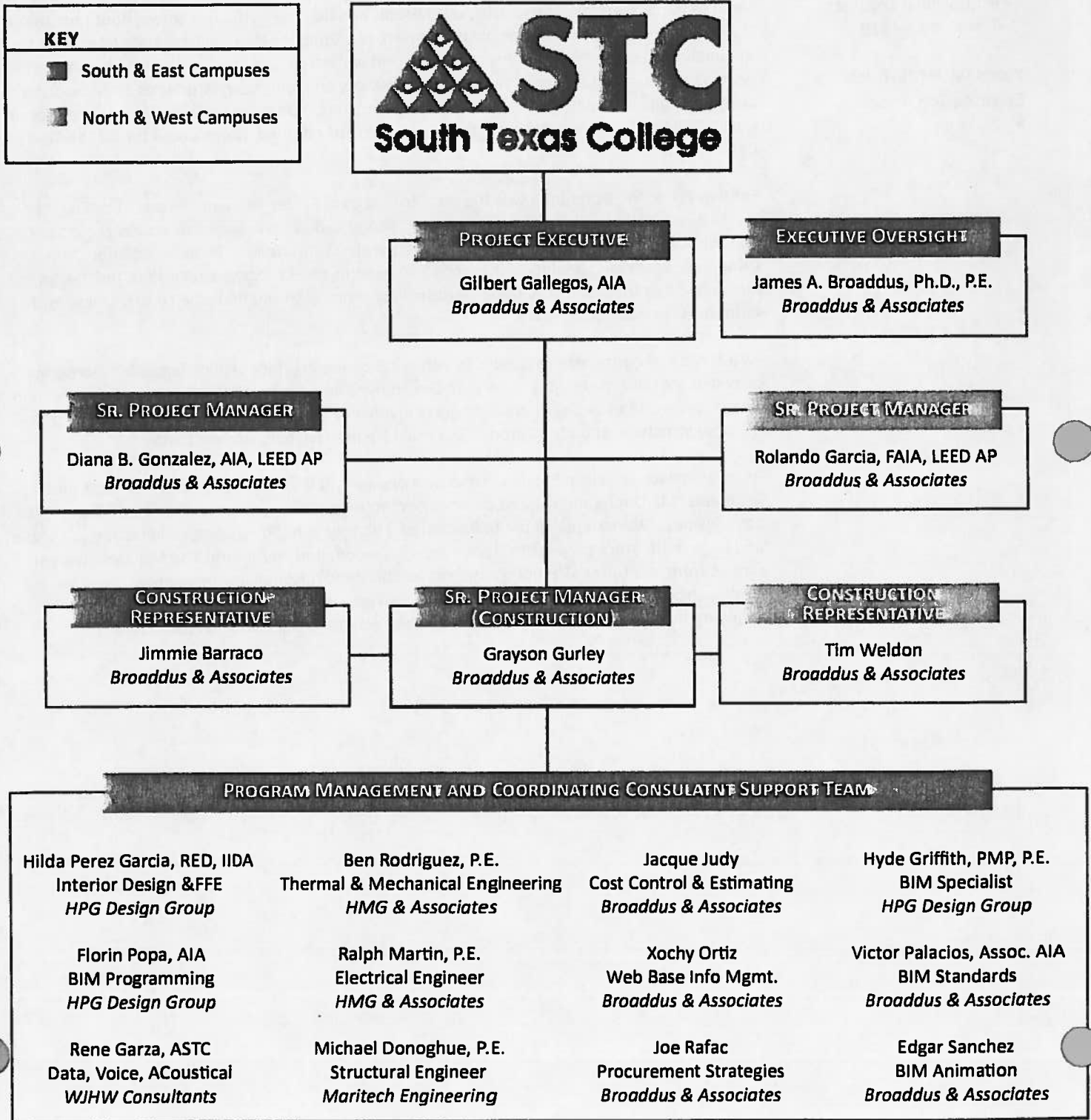
As a Structural consultant to Datum Structures Engineering, Inc., Dallas, Texas, Mr. Donoghue provided specialized services relating to the analysis and design of multi-story construction on several projects in the Dallas area. Projects involved included the planning and analysis of a 40-story structure, and renovation of the main Neiman Marcus store in Dallas.

As an associate at Colaco Engineers and as a designer at Wyatt C. Hendrick, Architects and Engineers, Mr. Donoghue worked on a very broad range of projects of different sizes and complexities. Work required the utilization of a variety of building systems in both small scale and large multi-story projects in steel, concrete, wood, and aluminum. The facilities involved ranged from institutional buildings such as airports and hospitals to commercial high-rise construction up to 55 stories. Unique among his projects were governmental structures including the design of the Royal Palace and residences in Dammam, Saudi Arabia.



3.3.1 Provide an organizational chart showing the roles of the prime firm and each sub-group or individuals indicating their respective roles with the number of campuses and projects as identified in Exhibit A.

The Broaddus & Associates team represents a carefully organized, tiered hierarchy comprised of executive leadership, a program management team, and a coordinating consultant support team. This proven team is structured to provide the maximum amount of resources, expertise, and depth of capabilities, while at the same time providing for a singular point of reference for STC.





III PROJECT TEAM

3.3.2 For each team or individual that the prime firm proposes, if applicable:

- **Identify the team/individual and provide a brief history**

PRIME FIRM - Broaddus & Associates

Broaddus & Associates was established in 2000 by James A. Broaddus, Ph.D., P.E. Following a 20-year career as a U.S. Navy Civil Engineer Corps Officer and Seabee where he built facilities across the globe, Dr. Broaddus served as Associate Director of the Construction Industry Institute (CII), a national research center dedicated to improving quality and cost-effectiveness on construction projects.

Combining his naval background in practical application and his CII research on Best Practices, Dr. Broaddus then served as Director of Facilities Planning and Construction for the 15-campus statewide University of Texas System from 1994-1998, where he was responsible for \$1.4 billion of higher education facilities construction. During his subsequent tenure as CEO of Design-Build Institute of America, Dr. Broaddus recognized an acute need to assist owners in the management of complex, major capital construction programs.

Broaddus & Associates was founded because as clients, we saw the need for a firm to help manage our work. This owner-oriented philosophy is the reason all of our executives are involved and deeply committed to every project: we have walked in your shoes. Best Practices programs such as constructability, pre-project planning and partnering have been used in addition to alternate project delivery systems to effectively control budgets, compress schedules and create satisfied clients.

The firm began in Austin, Texas, where it still maintains its corporate headquarters. Soon afterward, an office in McAllen was opened to support our operations in the Rio Grande Valley. This was the first of nine regional offices that would open over the course of the next 10 years. In this time, the company has expanded to include over 100 project professionals covering different regions and market sectors.

Core Businesses

- Project & Program Management
- Comprehensive Planning
- Public-Private Partnerships
- Consulting Services
- Construction Contracting and Design-Build
- Web-based Program and Project Management Software



SUBCONSULTANT - HMG and Associates

HMG and Associates provides dedicated mechanical and electrical engineering design services for a wide variety of regional, national and international clients from offices in Austin and San Antonio, Texas. HMG specializes in engineering design, studies, reports and construction administration. Since our inception in 1983, we have provided professional services to clients in the Industrial, Institutional and Governmental markets. HMG has successfully completed over one thousand projects in its brief history, much of which is repeat business. The organizational structure of HMG allows the engineers and designers to remain intimately involved with the project from inception through construction. HMG is a very proactive company dedicated to anticipating and serving the individual needs of each client.

Core Businesses

- Mechanical
- Electrical
- Plumbing
- CADD
- Construction Administration

SUBCONSULTANT - HPG Design

HPG Design Group and **PB Group** is a minority-owned design team that has 48 years of combined experience. We are a diverse Architectural and Interior Design team that encompasses corporate, institutional, government, Higher Education, and K-12 School District work. Altogether, the principals of HPG Design Group and PB Group have worked together for nearly 9 years. In addition to Architectural and Interior Design services, HPG Design Group & PB Group can provide the expertise of Building Information Modeling/Management (BIMM).



SUBCONSULTANT - WJHW

Established in 1990, **Wrightson, Johnson, Haddon & Williams, Inc. (WJHW)** is a 40+-person W/DBE and HUB-certified firm offering acoustical consulting and state-of-the-art technical systems design and consulting in the following areas:

Core Services

- Acoustics & noise control
- Audio visual presentation systems
- Digital signage and way finding
- IT Tel/data structured cabling
- Video & scoring displays
- Broadcast provisions & video production
- Theatre planning & systems
- Lighting & rigging
- Distributed TV & satellite
- Video surveillance & access control
- Sound systems design
- Security systems design

We have developed a detailed understanding of the unique acoustical and technical systems associated with on a diverse range of higher education project types, including technology intensive classrooms, auditoriums, TV/radio broadcast & production facilities, arenas, high-end performing arts spaces, and stadiums.

We are more than just designers and technicians, we are problem solvers, and our services are tailored to meet the expectations of the client. WJHW's ability to probe for the real needs of the client, extract this information, recommend and produce an imaginative, yet practical design is the foundation of what we do. As such, we specialize in applying technology to the environment while developing design recommendations that produce results. Our understanding of the educational facility and its users, coupled with our ability to meet the needs and goals of the client is the cornerstone of our success.

At WJHW, our design philosophy is simple - we listen. Our sincere client interest, ability to listen, orientation toward technical excellence, on-time delivery, adherence to cost control, and dedication to team communication make WJHW a valuable consulting resource to the design community.

SUBCONSULTANT - Maritech Engineering

Maritech Consultants is an independent multidiscipline engineering company who provides design and technical services to ship owners, ship yards, offshore and onshore industry. Maritech Consultants as was established in March 1995 as a successor of Glommaconsult A/S, established in 1974. The shareholders are active partners in the daily management. Maritech is centrally located in Fredrikstad, about 90 km south of Oslo, Norway. Maritech's overall goal is to be a supplier of high quality design and to be a reliable and cost effective supplier of engineering services.

• Describe the team/individual's proposed role in the project

Broaddus & Associates will provide overall program management for the STC Bond Program. Below is a description of individual roles.

Project Executive/Executive Oversight

Dr. Broaddus and Mr. Gallegos will be responsible for implementing company and contract policy and for committing company resources, such as staff, equipment, and support to enable field assigned personnel to meet the needs of Broaddus & Associates' clients. Mr. Gallegos will also provides frequent customer interface at all levels to resolve issues, provide guidance, insight, and prompt timely decisions.

Senior Project Manager

As Senior Project Manager for Broaddus & Associates **Ms. Gonzalez and Mr. Garcia** will be responsible to the project executive, project advisor, and client for the project's budget, schedule and quality. They will interface with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved.

Construction Representative

As Construction Representative for Broaddus & Associates, **Mr. Barraco and Mr. Weldon** will be responsible to the



PROJECT TEAM

project manager for all field matters related to construction activities, including documenting contract and code compliance. Thier field experience is invaluable during site inspections and the preparation of field reports.

Senior (Construction) Project Manager

Mr. Gurley will be responsible to the project executive, project advisor and owner for the project's budget, schedule and quality. He will interface with client user groups, client planning and facilities staff, designers, contractors, and code officials to ensure the project budget, schedule, and quality goals are all achieved. Mr. Gurley has extensive knowledge in all phases of design, development, construction, commissioning, and validation of complex projects.

Cost Control and Estimating

Mr. Judy will serve as a Cost Control Estimator for Broaddus & Associates. He will provide estimates for projects in a variety of stages, meets with the owner to ensure their needs are met, establishes budgets with owners, develops project scopes, procures construction contracts, and coordinates design team efforts with owner guidelines.

Web Base Information Management

Ms. Ortiz will serve in an administrative role and will support the Broaddus & Associates project team with all the administrative details of a Project Coordinator assuring program quality through the initial planning through design, construction and commissioning of projects in order to protect the owner's interest.

Procurement Strategies

Mr. Rafac will assist the owner with updates to contractor selection criteria, assist with solicitation, evaluation and selection of potential contractors. He will also assist the Owner in the preparation of contracts and contract negotiations or re-solicitations if necessary.

BIM

Mr. Griffith, Mr. Sanchez, and Mr. Palacios will oversee all aspects of the design to ensure the project will achieve three deliverables that contribute to the overall BIM strategy, should the client choose to use BIM. The deliverables include BIM Data Model, Constructability Model, and CMMS Input (an import from BIM for O&M purposes). Each deliverable has a scope and outcome target. Mr. Griffith's supervision will ensure that the project team cooperates and collaborates to achieve the goals for the project.

HPG Design Group will provide architectural, interior design, and BIM services. Below is a description of individual roles.

Ms. Garcia and Mr. Papa will provide architectural and interior expertise. Mr. Papa will also assist with BIM deliverables which include BIM Data Model, Constructability Model, and CMMS Input.

WJHW will provide acoustical and technical systems support. Below is a description of the individual role.

Mr. Garza will provide acoustical and technical systems support. He will provide expertise in acoustics & noise control, audio visual presentation systems, IT tel/data structured cabling, theatre planning systems, lighting, video surveillance and access controls. He will also oversee all sound and security systems designs.

HMG & Associates will provide mechanical and electrical engineering design services. Below is description of individual roles.

Mr. Ben Rodriguez will be responsible for the management, design, and coordination of mechanical and electrical systems.

Mr. Ralph Martin responsibilities will include the review of appearance, coordination, accuracy, and adequacy of drawings, calculations, specifications, cost estimates and reports, assuring the design satisfies and confirms to the Owner's requirements and code criteria for all electrical systems.

Maritech Engineering will provide structural engineering services. Below is a description of individual roles.

Mr. Michael Donoghue will coordinate, review, evaluate and recommend approval of all schematic design documents submitted by architects and engineers. He will also review construction documents for compliance with program requirements and completeness.

- **Describe the team/individual's related project experience**

The team's related project experience can be found behind TAB IV, Representative Projects. Individual related project experience can be found on the resumes behind TAB II.



- **List projects that the prime firm and the team/individuals have worked on together**

Broaddus & Associates/WJHW Project List

- Edinburg CISD, J. Economedes High School Fine Arts Building
- Edinburg CISD High School Fine Arts Building
- Edinburg CISD North High School Fine Arts Building
- Edinburg CISD, Robert Vela High School Fine Arts Building
- City of McAllen Convention Center
- SPI Convention Center Renovations
- Alamo Colleges, Northeast Lakeview College
- Alamo Colleges, Northwest Vista College
- Tarrant County Medical Examiners Office
- Tarrant County Civil Courts Building

The Broaddus & Associates team has worked on the following projects together

- Bond Program Management, South Texas Community College, 5 campuses – 25 projects, \$100 million, Lower Rio Grande Valley, Texas
- Bond Program Planning & Management, The University of Texas at Brownsville/Texas Southmost College, 235,000 SF, \$77.7 million, Brownsville, Texas
- Bond Program Management, Edinburg Consolidated Independent School District, 11 projects, \$112 million, Edinburg, Texas
- Health Facility, Tropical Texas Behavioral Health, 143,748 GSF, \$6.2 million, Edinburg, Texas
- Robindale Wastewater Treatment Plant, Brownsville Public Utilities Board, \$28.7 million, Brownsville, Texas
- Boys & Girls Club, Boys & Girls Clubs of Edinburg RGV, 32,237 SF, \$5 million, Edinburg, Texas
- South Texas Regional Call Center, Chase Source, 41,485 SF, \$3.5 million, Edinburg, Texas
- Bond Program Management, Edinburg Consolidated Independent School District, Eleven Projects, \$112 million, Edinburg, Texas

Benigno Rodriguez, PE and Ralph E. Martin, Jr., PE worked on the following projects together:

- University of Texas Pan Am Education Complex, Addition and Renovation, Edinburg, TX
- University of Texas Pan Am Academic and Administration Building Addition, Edinburg, TX
- University of Texas New Student Union, Brownsville, TX
- University of Texas Life Health Sciences Building, Brownsville, TX
- University of Texas, New Regional Academic Health Center Brownsville, TX
- University of Texas / Texas Southmost College Chiller Replacement, Brownsville, TX
- University of Texas Central Plant Expansion Brownsville, TX
- Texas A&M University Renovations to Canseco & Coward Buildings, Laredo, TX

Hilda Garcia and Florin Popa have worked on the following projects together:

- Texas A&M San Antonio; \$4 million budget for FF& E package for Central Academic Building
- Alamo Colleges; Chancellor's and Vice Chancellor's Office Suite Renovation, Sheridan Complex
- Alamo Colleges; St. Phillips College, Southwest Campus – Building 3020
- SAISD Bond Issues – Assessment of all Schools for SAISD for Bond Issue

- **Provide resumes giving the experience and expertise of principals and key professional team members who will be assigned to the project.**

Team resumes can be found behind TAB II.

- **Provide a list of all principals & Key team members who are registered architects or engineers.**

- | | |
|--------------------------------------|----------------------------|
| • Dr. James A. Broaddus, Ph.D., P.E. | • Rene Garza, ASTC |
| • Gilbert Gallegos, AIA | • Ben Rodriguez, P.E. |
| • Rolando Garcia, FAIA, LEED AP | • Ralph Martin, P.E. |
| • Diana Gonzalez, AIA, LEED AP | • Michael Donoghue, P.E. |
| • Hilda Garza, RED, IIDA | • Hyde Griffith, PMP, P.E. |
| • Florin Popa, AIA | |

Broaddus & Associates is a registered professional engineering firm.

3.4.1 List a maximum of five (5) education projects for which the prime firm provided or is providing construction program management services which are most related to this program.

The pages that follow include five selected projects we consider relevant examples for the STC Bond Program. These projects serve as a sample of our overall portfolio of higher education projects. While reviewing their detail on the following pages, please consider our firm's broader experience in higher education:

We have worked for 36 higher education clients (95% in Texas) since our beginning 13 years ago. Selected institutions are listed below:

- Lone Star College System
- Sam Houston State University
- South Texas College
- Stephen F. Austin State University
- Texas A&M University System and 4 components
- Texas Southern University
- Texas State Technical College - Harlingen
- Texas State University - San Marcos
- Texas State University System and 4 components
- Texas Tech University
- Texas Woman's University Health Science Center
- University of Houston System
- University of North Texas System
- The University of Texas System and 8 components
- Zapata Higher Education Center

We have managed \$2.1 Billion in higher education projects, plus \$600 million in lab and research facilities that are primarily higher education related. The unique nature of higher education requires experience in a diverse set of projects; our experience includes the following types of higher education projects:

- Academic Buildings - 92
- Library - 12
- Student Services - 25
- Fine/Performing Arts - 17
- Student Housing - 12
- Recreation/Fitness - 21
- Stadium/Arena - 7
- Labs/Research Facilities - 18
- Maintenance Facilities - 14
- Parking Structures - 6
- Utility Plants - 4
- Utility Distribution Systems - 5

Total Project Cost:
\$ 100,450,000

Construction Cost:
\$ 78,800,000

Size:
794,000 SF

Category:
New Construction

Project Delivery:
Various Methods

Key Dates:
Design Start:
06/01/02
Design Approval:
Varied
Construction Start:
07/01/03
Completed:
09/01/04 (Ph. 1)
09/01/05 (Ph. 2)
12/01/06 (Ph. 3)

Contract Relationship:
Program Manager

Services Provided:
Preprogram Planning, Program
Management

Project Executive:
James Broaddus, Ph.D., P.E.

Program Manager:
Gilbert Gallegos, AIA

Project Manager:
Grady Deaton, Ph.D.
Rolando Garcia, FAIA

Owner Reference:
Mr. Gary Gurwitz
Vice Chair of the Board
South Texas College
Professional Arts Building
818 Pecan
McAllen, Texas 78502
Ph: 956-632-8251

Multiple Campus Building Program Management South Texas College McAllen, Weslaco, and Rio Grande City, Texas

Broaddus & Associates was retained in advance of a community-wide bond election to assist South Texas College (STC) in preparing a pre-bond execution plan. This plan was prepared to assist STC in defining the scope, implementation plan and overall cost for further development of five separate campuses of the fastest-growing community college in the nation. The preprogram execution plan included program process development, facility programming, total project budgeting and conceptual cost estimating, master program scheduling, facilities standards, and design guidelines.

At the time Broaddus & Associates was retained, STC had prepared a multi-campus master plan estimated to cost \$115 million. In close collaboration with the trustees, administration and overall campus users, Broaddus & Associates reconfigured and refined the plan, resulting in more than \$16 million in total program savings, while at the same time creating an additional 32 classrooms beyond that of the initial master plan. The final \$98.7 million bond program was successfully endorsed by the community. By securing additional grant funding, STC was subsequently able to increase the overall project budget and program.

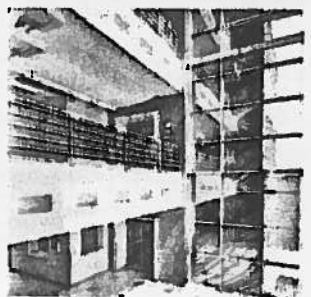
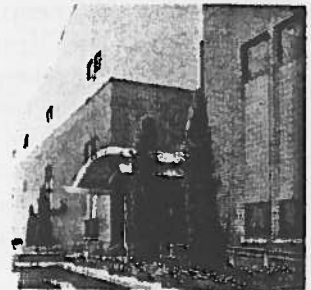
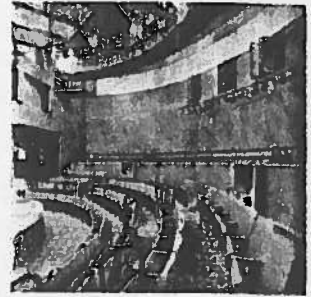
The preprogram execution plan identified 25 specific projects on five separate campuses, and served as the roadmap for implementation of design and construction. Broaddus & Associates managed the entire program.

Project Similarities & Relevancy

Broaddus & Associates provided leadership and management to five separate A/E and four construction management at-risk firms. In addition to the preprogram execution plan, Broaddus & Associates provided all detailed programming which was the start of implementing the design process. By incorporating a central decision-making process, STC was able to provide the same level of facility quality and standardization throughout all campuses. Broaddus & Associates served as the single point of contact for the owner. Program management responsibilities included:

1. Establishing overall schedule with key milestones, referred to as Master Project Schedule (MPS)
2. Providing cost and schedule control systems
3. Leading partnering and team building activities to build the project team
4. Briefing the governing board and executive sponsors regularly
5. Conducting meetings among key project participants regularly
6. Resolving issues and addressing concerns
7. Executing and overseeing quality assurance programs

Broaddus & Associates also expedited the building permit process, which is of great value to an educational facility tied to annual school calendars. As STC's Chief Business Officer remarked, "We delivered 16 buildings in 16 months."



Contract Delivery Method
Professional Services/Consulting Contract

Construction Cost
\$ 58,275,000

Size
235,000 SF

Category
New Construction

Project Delivery
Construction Manager-at-Risk

Key Dates
Design Start:
07/01/07
Notice to Proceed:
6/2010
Completion:
06/30/2010

Services Provided
Program Management

Project Executive:
James Broaddus, Ph.D., P.E.

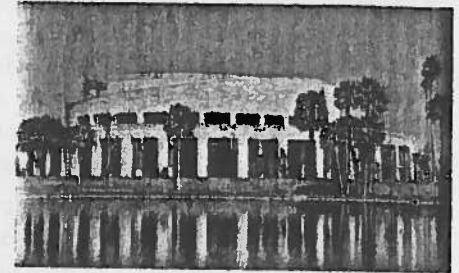
Program Manager:
Gilbert Gallegos, AIA

Project Manager
Diana Bravo Gonzalez, AIA

Reference:
Ms. Veronica Mendez
Assistant Vice President for
Facilities & Planning
80 Fort Brown
Champion Building
Brownsville, Texas 78520
Ph: 956-882-4311

**Bond Program Planning & Management
University of Texas at Brownsville and Texas Southmost College
Brownsville, Texas**

The University of Texas at Brownsville and Texas Southmost College (UTB/TSC) is located in Brownsville, Texas, and occupies the site of old Fort Brown, a national historic site. The architectural inspiration of buildings follows the mid-1800s Spanish Fort style. The campus has grown from 49 acres to over 300 acres, while the student body has increased to about 17,000 undergraduate and graduate degree-seeking students per semester. In 2002, UTB/TSC acquired a 600,000 SF 30-year-old shopping mall on a 40-acre site. The facility is known as the International Technology, Education, and Commerce Campus (ITECC).



In 2005, UTB/TSC was successful in passing a \$68 million bond program for the construction and renovation of its campus facilities, and the approval allowed for leveraging financial resources thus increasing the bond program to \$77.7 million.

Broaddus & Associates was selected to manage this bond program, which included a 58,000 SF, \$25.7 million Arts Center, a 43,000 SF, \$14.4 million east library, renovations to the 20,000 SF, \$3.1 million Oliveira Library, a 37,000 SF, \$10.9 million large classroom building, the 17,000 SF, \$5 million Center for Early Childhood Studies, renovations to

the 60,000 SF, \$18.6 million International Technology, Education, and Commerce Campus, and upgrades to the thermal plant infrastructure.

The program management scope of services included establishing budgets, guiding the programming process, and managing communication updates with the advisory committees and board bond advisory committees. As part of the services, Broaddus & Associates also managed the programming for each building, and selection of design professionals and contractors, guided design presentations, reviewed construction drawings, and provided constructability reviews and overall budget management. Construction administration and quality assurance oversight services were provided, as well as final closeout and warranty administration.

Broaddus & Associates provided quantifiable value-added services for UTB/TSC bond program in the amount of \$4.1 million. This effective strategy included mass purchasing of materials and equipment, as well as value engineering and constructability reviews.

Examples of these savings included the purchase of brick for the entire bond program, which saved approximately \$800,000, and the purchase of builder's risk insurance which resulted in savings of approximately \$400,000. Broaddus & Associates' innovative management approach in essence paid for the project management fee multiple times.



Our team utilized both regional project managers and subject matter experts from our corporate office to ensure UTB received the best possible level of support for its projects; the organization of this support is indicative of the deployment strategy.

IV

REPRESENTATIVE PROJECTS

Total Project Cost:

\$112 million

Size:

750,000 SF

Category:

New Construction, Expansion and Renovation

Key Dates:

Design Start

01/2009

Construction Start

05/2009

Complete:

08/21/2012

Project Delivery:

CM-at-Risk

Services Provided:

Construction Program Management

Project Executive:

James Broaddus, Ph.D., P.E.

Project Director:

Gilbert Gallegos, AIA

Sr. Project Manager:

Rolando Garcia, FAIA

Owner Reference:

Dr. Mario H. Salinas, Assistant Superintendent for Support Services

411 N. 8th Edinburg, Texas 78541

Ph: 956-289-2300

m.salinas@ecisd.us

2008 Bond Program Management

Edinburg Consolidated Independent School District

Edinburg, Texas

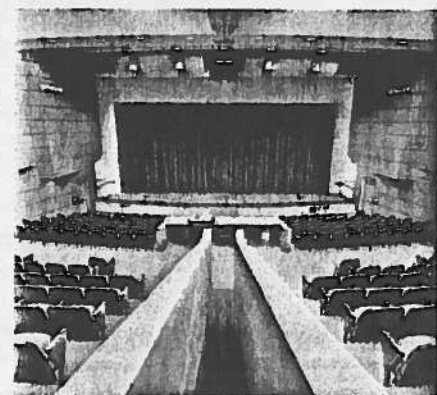
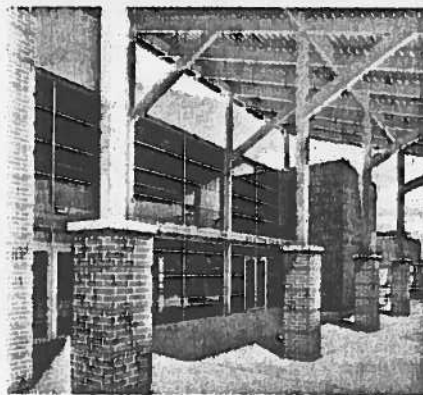
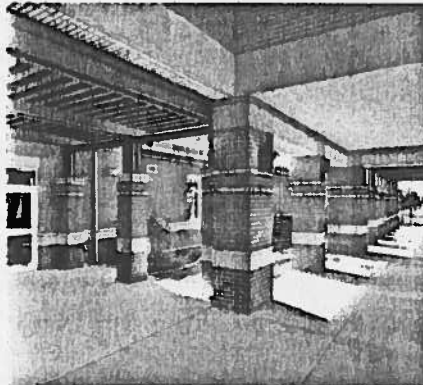
Broaddus & Associates provided bond program management services to Edinburg Consolidated Independent School District in South Texas. This involved new construction of four elementary schools and two middle schools, renovations, converting Harwell Middle School into the district's fourth high school, adding a multipurpose fine arts center to each of the three existing high schools, and additions/renovations at Brewster Elementary School.

Edinburg CISD (ECISD) encompasses 945 square miles and has three high schools, five middle schools, one alternative campus, and 27 elementary schools. Today, the district has approximately 4,300 employees, with peak enrollment for 2007 – 2008 at 29,847 students.

In the May 10, 2008, bond election, voters authorized \$112 million for the school district to enhance its infrastructure to create safe, efficient, state-of-the-art facilities and resources that elevate the learning environment.

Due to unsuccessful past experiences coupled with the size of this bond program, ECISD wanted to hire a firm with extensive experience in project management. The Board of Trustees' goal for selection and contracting for architects and contractors was to be open, fair, and objective to the point of including community oversight of the bond program.

Broaddus & Associates made cost-saving recommendations by strategic structuring of projects, prototypes, contracts, and procurement strategies that would assist in maximizing value to the school district.



Total Project Cost:
 A. \$ 124,075,333
 B. \$ 112,420,199

Size:
 A: 356,352 SF
 B: 327,834 SF

Category:
 New Construction, Renovation,
 and Additions

Key Dates:
 Design Start
 05/15/2006
 Construction Start
 06/01/2007
 Complete:
 Phase 1: 09/03/2008
 Phase 2: 07/2009

Project Delivery:
 Construction Manager at-Risk and
 Competitive, Sealed Proposal

Services Provided:
 Construction Program
 Management

Project Executive:
 James Broaddus, Ph.D., P.E.

Project Director:
 Patrick Renfro, AIA

Sr. Project Manager:
 Michael Willy

Project Manager:
 Grady Deaton, Ph.D.

Owner Reference:
 Mr. John Strybos
 Associate Vice Chancellor of
 Facilities
 7990 Pat Booker Road
 Live Oak, Texas 78233
 Ph: 210-485-0700
 jstrybos@alamo.edu

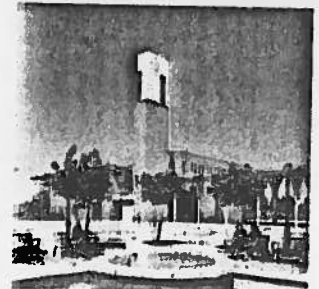
**2005 Bond Capital Improvement Program
 Alamo Colleges
 San Antonio, Texas**

In November 2005, Bexar County voters approved a \$450 million bond proposal to support the growing Alamo Colleges student population, which is currently above 52,000. In anticipation of the bond election, Alamo Colleges selected Broaddus & Associates as a consultant to develop a comprehensive strategic plan for district-wide campus expansion. Broaddus + Project Control (B+PC) was selected by Alamo Colleges to become the program manager for new construction of the Northeast Lakeview College and renovations/additions to the Northwest Vista College. These programs include:

- a. The Northeast Lakeview College program included \$124 million for a new ground-up campus located along the I-35 corridor. The construction included every building type and infrastructure necessary to have a complete college campus.
- b. The Northwest Vista College program included \$112 million improvements, including several academic buildings, a theatre and fine arts complex, a library and learning center, and a student commons building.

The program was delivered within budget due to accurate control of cost estimates. B+PC assisted Alamo Colleges in saving \$7.8 million in construction of Northeast Lakeview College, and \$4.77 million on Northwest Vista College. This is an incredible achievement since Alamo Colleges' bond issue passed when construction costs were experiencing double-digit inflation for building materials and labor. The traditional low-bid project delivery method risked being over budget and untimely. B+PC suggested the Construction Manager-at-Risk alternate project delivery method, which would require a guaranteed maximum price quote from the contractor.

The projects were constructed on a fast-track basis, allowing the colleges to open a year earlier than under normal conditions to help meet the high enrollment demands, resulting in one of the fastest ever higher education bond programs in Texas.



IV

REPRESENTATIVE PROJECTS

Total Project Cost

\$ 420,000,000

Project Size

1,080,000 SF

Category

New Construction and Renovation

Project Delivery

Construction Manager Agent

Contract Relationship

Program/Project Manager

Actual start and finish dates for design

Design Start

Varies per project

Construction Start

Varies per project

Completion:

Varies per project

Services Provided

Programming, Project/Program Management

Project Manager

MJ Welwood, LEED® AP

Reference:

John Fishero, J.D.

Vice President, Administrative Services

30555 Tomball Parkway

Tomball, Texas 77375

Ph: 281-357-3747

John.D.Fishero@

lonestar.edu

Bond Program Management

Lone Star College System

Houston, Tomball, Kingwood, and Conroe, Texas

Broaddus & Associates was selected by Lone Star College System to serve as program manager for the design phase of the system's bond program. The \$420 million bond program includes new construction and renovation on seven campuses and three satellite locations throughout the Houston area. Broaddus & Associates was responsible for overseeing the program by managing three project management firms, 14 architects, and 17 contractors through the design phase, ensuring it achieved the client's quality, budget, and schedule objectives.

North Harris projects included:

- New Health Professions Building
- New Student Services
- Renovated Academic Service Center
- New Technology Center Addition
- New Fine Arts Building Addition

Tomball College Campus projects included:

- New 20,000 SF Veterinary Technology Building
- New 30,000 SF Performing Arts Theater
- Renovation of 10,000 SF vacated area on the main campus
- Site and traffic infrastructure
- New 60,000 SF Health Science Building at the Tomball Medical Center

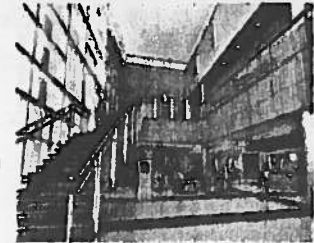
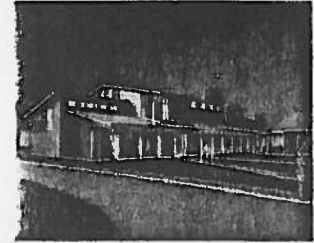
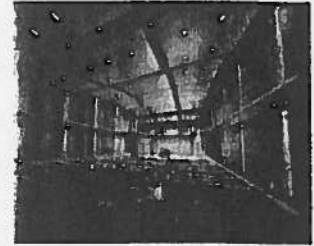
Kingwood Campus projects included:

- New Student Center
- New Performing Arts Center
- Multiple Renovations

Montgomery Campus projects included:

- New Health Sciences Building
- Renovations to Science Labs
- New Classrooms
- New Arts Instructional Building

Broaddus & Associates managed a fast-track procurement process, and provided the Web-based project management software for all system projects. The design teams used Revit, allowing the disciplines to become one integrated model and design, which increased our ability to fully coordinate the building components. They were able to continue coordination with non-Revit consultants by taking advantage of Revit's ability to intermix with other drafting software. As a result, rework in the field and field modifications were reduced and construction was faster, all of which translate into financial benefits to the owner.





3.5.1 Provide reference contact information for any five (5) of the projects listed in response to 3.4.1

Edinburg Consolidated Independent School District

Dr. Mario H. Salinas
Assistant Superintendent for Support Services
411 N. 8th Edinburg, Texas 78541
Ph: 956-289-2300
m.salinas@ecisd.us

University of Texas at Brownsville and Texas Southmost College

Ms. Veronica Mendez
Associate Vice President for Facilities & Planning
Riverside I
80 Fort Brown
Brownsville Texas 78520
Ph: 956-882-4313
veronica.mendez@utb.edu

Alamo College

Mr. John Strybos
Associate Vice Chancellor of Facilities
7990 Pat Booker Road
Live Oak, Texas 78233
Ph: 210-485-0700
jstrybos@alamo.edu

Lone Star College System

John Fishero, J.D.
Vice President, Administrative Services
30555 Tomball Parkway
Tomball, Texas 77375
Ph: 281-357-3747
John.D.Fishero@lonestar.edu

3.6.1 Provide any additional information the the prime firm believes may better describe its qualifications and/or be of benefit to the College and any additional information relevant to the services to be provided to the College as specified in Section 2.

Owner InSite®

Should we be selected for this project, Broaddus & Associates offers to utilize Owner InSite® (OIS) software. Unlike many other enterprise solutions available on the market, OIS is not general contractor software modified for the owner. OIS was created with real input and practical knowledge from both owners and project managers to give them the information necessary to manage projects in all phases and of all sizes.

This Web-based software is a true single point program for all team members. OIS is the one application with unlimited seats (users) that allows all the team members to collaborate in real time. And by all team members, we mean all: owner, end-users, project manager, architects, engineers, contractors, subcontractors, specialty consultants, fabricators, and commissioning agents, to name a few. This allows all team members to clearly communicate about items in one location. No more Request for Information (RFI) logs duplicated by the architect and the contractor. No more confusion about the name and number of a change order request.

With full audit capability, financial tracking and project controls like RFIs, submittals, change orders, and pay applications, project managers are seamlessly provided the information they need to make their jobs easier. Simply put, OIS not only tracks valuable project data, but it also makes it accessible to all members of the team.

Best of all, each different project in a program is tracked separately, but can be viewed together as a whole. Your staff can view the smallest detail of each project, or run a report summarizing the status of all projects at a given time. OIS's user interface is one of the simplest, cleanest, and most intuitive around. The software is organized by function. Each module is located under its clearly named tab. Within each tab are multiple functions organized under sub-tabs. The modules are:

Accounting Module - OIS has full cost control and budget management capabilities, including the ability to update and forecast costs in real-time. The project accounting module allows the team to input a completely customizable project budget (not just the design or construction budget), enter and approve or decline contracts, change proposal requests, change orders, and pay applications. All of the data is linked so that when any of these items are entered, the project cost is automatically updated. The system also allows for budget transfers and keeps a double-entry accounting log of all transactions. Forecasting can be easily accomplished mathematically through the detailed data in the budget/cost tab, as well as visually through the construction phase cumulative cash flow curve.

Design Management Module - OIS's design management tab not only allows for document and plan reviews to be uploaded, but also allows for drawings to be uploaded and updated (with version tracking capability), as well as the ability to assign and track any design related issues.

Communications Module - OIS can manage and track all team communication through two different means. Currently, the system allows users to create letter correspondence within the system and e-mail it through the software. Other correspondence like memos and transmittals are currently being added and will be available shortly. In addition, all correspondence created outside of Owner InSite® and e-mail can be uploaded to the system.

Construction Controls Module - OIS has built in processes for creating, approving, and tracking RFIs, ASIs, submittals, and field reports. That means that in addition to the existing templates for each of these functions, the system will automatically route them for comment and approval to all the necessary parties and store them with the appropriate cross-reference links for future reference. These items can also be easily found within the system through our full search capability.

Document Management Module - OIS provides comprehensive and organized document management from pre-design through project completion for all phases of each project through its completely customizable document management section. Each project can customize the tabs it requires for indexing of documents and the files can be filtered by filename, caption, or label. The type of documents or images that can be uploaded to the system is unlimited, as is the file size. In addition, the system tracks the document version so that users can identify and use the correct document.

People Module - OIS allows users with the correct level of access to modify the automated distribution of materials to individuals within the project. The system also allows any user to print or e-mail any page within their access to any individual whether or not they are on the automated distribution list. In addition, the project creates an organized directory of all project users.

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Set Up Module - OIS is one of the few, if not the only project management software available that allows an unlimited number of users with each user given access to as many or as few projects as deemed appropriate. Individuals with a high level of security can give companies and individuals access to any given project, as well as define approval routing for that specific project. In addition, each user can be given a different level of access to each project guaranteeing the security necessary by the owner. Resources can be allocated and given access at any point in the project.

FEATURES:

- OIS cannot only track multiple projects simultaneously, but unlike other enterprise software, it allows budget transfers between projects so that the owner has full flexibility on how the funds are used within a program.
- OIS has the ability to generate reports from detailed field reports and broad view summary reports. Each page of OIS also serves as a log that can be sorted, printed and/or e-mailed directly from the software. In addition, if the University requires a specific report, it can be customized in the software for this program.
- OIS allows users to schedule and forecast within the system. The schedule sub-tab in OIS contains a fully customizable summary schedule that can be updated in real-time. This scheduling feature, which does not require third-party add-ons, allows the team to track major activities for management purposes and can be made to include numerous tasks outside the general contractor's scope. The OIS schedule is not intended to take the place of the general contractor's schedule, (which is required of the contractor as part of their contract), but OIS does allow the general contractor to continuously upload his schedule in the document management section for full interaction by the team. Users can also forecast costs through the accounting module previously described.
- OIS sync-capabilities with Outlook calendars are in place. When scheduling meetings through OIS, the system automatically e-mails calendar invites to invitees. The calendar invites appear on the invitees' Outlook calendars when accepted. These meeting requests can be sent to individuals using OIS and to others not using the system as well.
- Punch lists can be uploaded, distributed, shared, updated, and assigned in OIS. In addition, the ability to use OIS on mobile devices allows the team to track this information directly from the project site.
- OIS's security protocols include role-based security per project. In other words, if a user has access to multiple projects, they can be given different levels of access depending on the project. The permissions for each role in OIS can be viewed and easily modified by the assigned system administrator. In addition, the login can be encrypted based on owner requirements.
- OIS's security strategy is as follows: OIS hosts its own primary servers in Austin, Texas, in a secure SAS-70 data center. Access to the data center requires a Biometric hand-scan and proxy card. In addition, the data center is staffed 24/7, 365 days a year. Over 60 video cameras are placed inside and outside the data center. The networks are secured with the latest industry standard technologies, including firewalls, and SSL encryption. They host the "Disaster Recovery" facilities for OIS within Amazon's EC2 "cloud."
- At the application level, OIS has a very granular roles and permissions system. This allows our customers to define who has access to what kinds of data, and who can manipulate that data. Finally, OIS has a very detailed logging and audit tracking system, which allows the client to view the historical access and use of the product.
- OIS allows Building Information Modeling (BIM) collaboration capabilities through two means. First, with its no file size limitation ability, team members can upload full BIM models to the system for collaboration. In addition, conflict reports can be easily uploaded, distributed, shared, updated, and assigned in the system.
- Quality management can be enforced through OIS utilizing the ability to upload, distribute, and share quality standards, as well as assign tasks when deficiencies are encountered. The ability to mark a task as "non-compliant" enables the entire team to ensure the project is being designed, built, and closed-out in a manner that meets the STC's standards.
- OIS includes training, full technical and application support, and maintenance at no additional cost.

INTEGRATION/HARDWARE AND SOFTWARE REQUIREMENTS: OIS can be made to integrate with other software packages. OIS was created here in Texas. The programmers are here in Texas and can easily and quickly respond and accommodate software customization and integration needs. OIS can easily meet the requirements of STC because it is Web-based and scalable, meaning that up to 10,000 simultaneous users can log in from anywhere in the world to access real time data. OIS supports both Windows and Mac OS, and any OS capable of running a supported Web browser including, Internet Explorer 7 and higher, Google Chrome, Apple Safari (and mobile Safari), and Firefox 3 and higher, to name a few. A computer must simply have a 233 MHz processor or higher, Windows XP service pack 2 (sp2) or higher, and 64 MB of RAM to operate OIS. In addition, OIS can be used on many mobile devices, enabling the project staff to input data in real time while on the project site.

LESSONS LEARNED: Broaddus & Associates has been successfully using OIS since 2004 on hundreds of projects, including STC's past bond program. The use of the system varies from project to project based on the level of information required by the client and their involvement. Its flexibility, ease of use, low-cost model, and ability to track all phases of a project, not just the construction, make it an ideal product for owners and project managers. Its ability to roll up multiple projects into one program makes it an exceptional tool.

Value Engineering

We will maximize every dollar allotted by value engineering each project to identify possible cost savings or repurposing of funds. We have outlined below examples of value provided to previous owners as a part of project management services.

Hays Government Center

Replacement of a failed project delivery system: At the time Broaddus & Associates was retained, the total project cost was estimated at approximately \$118,000,000. The Hays County Court directed Broaddus & Associates to reduce the cost and maintain the original schedule of completion. After extensive analysis by Broaddus & Associates' staff of architects, engineers, planners, and Project Managers, Broaddus & Associates offered the County three design and construction alternatives. These alternatives put the project within a budget and timeline that lead to a unanimous decision by the Court to approve going forward with the project.



From over twenty-two respondents, Broaddus & Associates led the selection of the Balfour Beatty/HDR design-build team to create a new, less costly design. Through a process of "right-sizing" the program by Broaddus & Associates' planning group, the new design achieved the client's goal of retaining all original departments and staff, a goal for future expansion for facilities and staff, with a new budget of \$72 million, subsequently reduced to \$65 million. This was achieved by Broaddus & Associates through effective management of design and bidding. The new total project costs represent savings from the original projected cost to the current projected cost of over \$44 million.

Case Study Net Savings: \$44,000,000

Installing/merging telephone system with network: The County had a combination of obsolete analog phone systems with various carriers throughout its offices. Broaddus & Associates issued an RFP for a new digital (VoIP) county-wide phone system which would operate over an upgraded secure Transparent Local area network (TLAN). This system eliminates long distance charges within the county, increases quality and reduces the monthly phone cost by more than \$10,000 per month over the 5 year payoff, and more after the 5 years. The upgraded TLAN network was included in the project at no additional cost to the County.

Case Study Net Savings: \$600,000

Hays County RPTP Facility Addition

At the time Broaddus & Associates was retained by the County, the total project cost was estimated at \$3,170,000 while the County budget for the facility addition was at \$1,690,000. Broaddus & Associates was directed to reduce the total project cost to within the budget while maintaining scope and schedule. Broaddus & Associates proposed Design-Build as an alternative construction delivery method. With a new design team and contractor onboard, Broaddus was able to achieve the County's budget and schedule goals while incorporating future expansion and expanding the program to include the Fire Marshal Department.

Case Study Net Savings: \$1,480,000

Texas A&M Health Science Center

In May 2007 Broaddus & Associates was chosen to be the Program Manager for a new Texas A&M Health Science Center campus. The Texas A&M University System decided that all projects would implement Building Information Modeling (BIM). The consultants selected were required to be proficient in 3-D design, but there was no clear direction as to what information was required and how to deliver a BIM model at the end of the project. Typically, the architect designs in a 3-D model for the contractor to utilize for clash avoidance before construction. Broaddus & Associates went one step further to educate and guide the project client to obtain the



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data that makes BIM an extremely useful tool throughout the life of the facility, not just through construction. Our staff identified the information required and has led the design consultants and the contractor to enter all the correct data into COBIE so that it can be used by the owner in managing the facility post-construction.

The skill of our team utilizing BIM had two major components. First, the CM-at-Risk was submitting budget estimates and GMP's that were high and excessive. We knew this through our own estimating and the BIM model. We were confident in terminating the CM at Risk and advertising for Competitive Sealed Proposals. We made the BIM module available to all proposers. The successful contractor submitted a bid \$5 million under budget. BIM provided more exacting quantities producing more precise bids and a smaller requirement for contingencies. In retrospect, our implementation of BIM produced a \$15 million savings in contractor bid numbers.

The second example is the use of COBIE to configure the BIM for O&M use. The actual savings are difficult to estimate since they project over the life of the facility, but national projections show these savings are far greater than construction phase savings due to the predictability of maintenance and the access to information of installed systems.

Case Study Net Savings: \$15,000,000

The Methodist Hospital – Outpatient Center

Broaddus & Associates was retained as program manager for The Methodist Hospital's 1.6 million SF Outpatient Center at the Texas Medical Center in Houston. Broaddus & Associates was retained to oversee the project from design through completion to insure it achieves Methodist's quality, budget and schedule objectives.



From a project innovation standpoint, the design team used 3-D modeling, did the major subcontractors. Through this tool design errors, construction and trade conflicts, delays and cost impacts are all minimized. Broaddus & Associates used multiple Guaranteed Maximum Price (GMP) submissions (foundation, core/shell and build-out) to fast track the construction and minimize scope erosion through price escalation. Through teamwork and evaluation of the design as it was generated, the cumulative total of value engineering achieved was \$28 million. An additional \$7.5 million was accomplished due to scope reduction based upon a program change by the client. The total savings achieved were \$35.5 million. Also part of the fast tracking process was the phasing of 200 building permits through the City of Houston. This intense, time consuming effort helped open the building on its original schedule, allowing The Methodist Hospital to begin generating operating revenue earlier than expected.

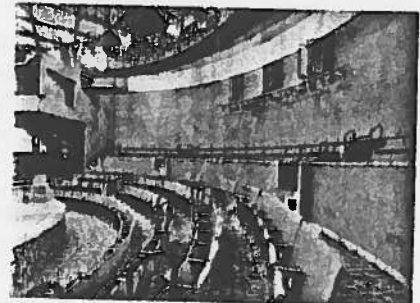
This large, complex healthcare project was accomplished in the dense, urban landscape of the world's largest medical center. It was done with great success and has received high marks from physicians and patients alike. The new building has become a destination for institutions nationwide looking to build world-class outpatient hospitals. This project has also received the Best Healthcare Project Award from Texas Construction Magazine in 2010.

Case Study Net Savings: \$33,500,000

South Texas College

Broaddus & Associates was retained in advance of a community-wide bond election in to assist South Texas College (STC), in preparing a pre-bond execution plan. This plan was prepared to assist the College in defining the scope, implementation plan and overall cost for further development on five separate campuses of "fastest growing community college in the nation."

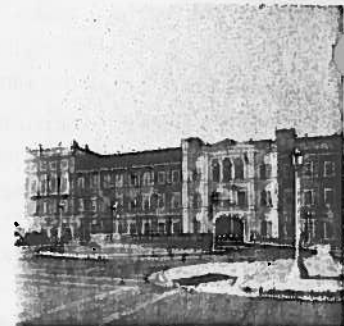
At the time Broaddus & Associates was hired, STC had prepared a multi-campus master plan estimated at approximately \$115 million in final construction cost; however, the Board of Trustees determined that the total project cost must be below \$100 million. In the weeks ahead, in close collaboration with the trustees, administration and overall campus users, Broaddus & Associates reconfigured and refined the plan resulting in more than \$16 million in total program savings, while at the same time creating an additional 32 classrooms beyond that of the initial master plan. The final \$98.7 million bond program was successfully endorsed by the community. Broaddus & Associates provided full-service project management for 25 individual projects on five separate STC campuses.



Case Study Net Savings: \$16,300,000

Texas Tech University Rawls School of Business

Texas Tech University retained Broaddus & Associates to assist in implementation of its capital improvement program, which included the three-story Jerry S. Rawls College of Business Administration building. The building project completed on time and \$6 million under the project budget. Broaddus & Associates was onsite throughout the building project and provided daily coordination, support, and resolutions.



Broaddus & Associates personnel positively impacted the project in several areas. Construction on the facility began six months ahead of the previously developed master schedule. BIM (Building Information Modeling) was introduced to the project team, and served as the standard for constructability reviews. Our active management of the procurement process resulted in the project being bid during a low point of construction costs that followed 2008's recession. With diligent monitoring of the construction process and the timely bidding, the project manager helped Texas Tech University System save approximately \$4 million.

The project manager led biweekly project status meetings and frequently met with Texas Tech administration and staff to maintain focus on project goals. During the excavation and foundation work, significant rainfall took place. Broaddus & Associates conducted construction staging alongside the contractor to minimize delays. Moreover, the project manager discovered potential weaknesses in the structural steel design and worked with the design team to rectify the issue. Broaddus & Associates was also involved in building commissioning and training Texas Tech University's facilities staff in operations and maintenance.

Case Study Net Savings: \$4,000,000

Methodist Healthcare Ministries



Broaddus & Associates was retained by The Methodist Healthcare Ministries to provide project management services for the new Wesley Health and Wellness Center in San Antonio, Texas. Through the utilization of a Design-Build approach, the project was completed in 17 months from start of design to occupancy. The project included demolition of an existing building and new construction. Broaddus & Associates provided value-added savings to this Methodist Healthcare Ministries project in multiple ways:

- 1) Identified \$900,000 in savings off original design
- 2) Used \$500,000 in returned savings to add scope to the project
- 3) Returned \$248,000 to owner to allow for additional furniture and equipment items

Multiple phases of the project had to be considered, due to the old facility having to be utilized until the new facility was complete. This facility was located adjacent to an existing childcare center and residential areas, requiring all the necessary zoning requirements to be in place. Additionally, the owner wanted a seamless integration with the neighborhood, so keeping residents informed was key and minimizing disruption was of utmost importance.

Case Study Net Savings: \$748,000

Alamo Colleges

Due to careful management and diligent oversight, the Broaddus & Associates team assisted Alamo Colleges in saving over \$4M on its Northeast Lakeview College campus projects, and over \$2M on the Northwest Vista College campus projects. In addition, our knowledge and experience in alternate delivery methods enabled the campuses to be completed one year earlier than they would have with traditional design and construction methods.



In anticipation of its 2006 bond election, Alamo Colleges selected Broaddus & Associates as a consultant to develop a comprehensive strategic plan for district-wide campus expansion. The joint venture of Broaddus & Associates and Project Control (B+PC) was selected to become the program manager for new construction of the \$125M Northeast Lakeview College, and \$106M in additions and renovations to Northwest Vista College.

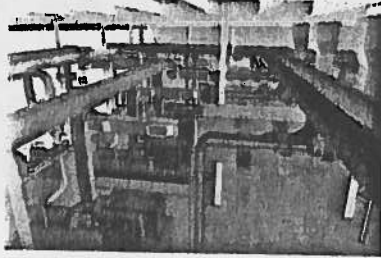
Due to accurate control of cost estimates, the program was delivered within budget. This was an incredible achievement, since Alamo Colleges' bond issue passed when construction costs were experiencing double-digit inflation for building materials and labor. The traditional low-bid project delivery method risked being over budget and behind schedule. Broaddus & Associates engaged the Construction Manager at-Risk alternate project delivery method, which would require a Guaranteed Maximum Price (GMP) quote from the contractor.

Case Study Net Savings: \$6,000,000

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Building Information Modelling (BIM)

Broaddus & Associates has engaged Building Information Management (BIM) project delivery for multiple clients. Broaddus & Associates' experienced staff understands the impact of BIM value stream on the services provided, is flexible and opportunistic in seeing the benefits BIM brings to a client, and will guide the client through the entire process. We make BIM work for the owner; this is not just a design the owner pays for.



Broaddus & Associates engineers now apply the use of BIM technology in new and developing ways, unlocking the team-generated project data as an incredible resource to improve operational efficiency and extend the life of buildings. In early development of the science, we led project teams to use BIM as a project delivery tool. More recently, we have been engineering the conversion of project data to practical, operational information used in Facility Life Cycle Management (FLCM), collaborating with nationally recognized teams to advance the use of BIM to support the entire building lifecycle. We have grown a thriving practice helping clients put BIM for FLCM to use in saving thousands of dollars a month in the building

operations.

Our applications engineers are recognized leaders in the development of BIM, guiding many projects to leverage BIM as a tool during and after the design and construction process. In fact, our efforts at Texas A&M were the focus of the cover story of the March 2011 *Engineering News-Record*, delineating some of our techniques in working with the client and the project team to make servicing the building more operationally effective, starting from the first day of occupancy.

Our use of project management methodology combined with BIM technology reduces the effort and costs that go into ownership transition and building management, ultimately adding years to the life of the building. BIM has grown beyond the initial value of pre-design, 3D modeling and trade clash detection in to an operational tool of planned service and predictable building cost management.

While each client and project varies, the constant is Broaddus & Associates' direct involvement in all aspects of the project to assure the Owner's new asset is delivered as a fully functioning and operational building. Below is a sampling of clients we have worked with in leveraging BIM technology to enhance designs, manage trade performance, or put operational systems in place to use technical design and construction data to improve operational efficiency, benefiting the building owners with significant operational savings and extended building life.

- Kaiser Permanente - National Facilities Services
- California Community College District
- Los Angeles Community College District
- Texas A&M Health Science Center
- Texas Tech Rawls College of Business Administration and Renovation
- National GSA IDIQ Contract
- The Methodist Hospital Outpatient Center
- Hays County Government Center
- Texas Children's Hospital New Maternity Center
- Texas State University San Marcos Bobcat Stadium Expansion
- University Health System University Hospital at the Medical Center
- University of Texas Medical Branch at Galveston - The Galveston National Laboratory & Institute for Human Infections and Immunity
- Lone Star College System
- St. John Neumann Catholic Church Sanctuary

Short-term benefits to owners: Enhanced Communication/Saving Capital and Time

- Visualization during Design - 3D modeling of site and building components at very early stages assists in decision making and communication.
- Schedule savings during Design
- BIM simplifies discipline coordination during the design effort.
- 2D contract documents can be produced directly from the 3D BIM.
- GMP Accuracy and Turn-Around Efficiency - Using "smart model" components for architectural, mechanical, electrical, and plumbing "bills-of-materials" take-offs can be derived directly from the BIM for use in bidding or to assist the owner with Guaranteed Maximum Price (GMP) cost reconciliation.
- Construction Cost Savings - Minimization of change orders through complete collision detection and resolution

during design documents/construction documents phases as opposed to during the construction phase.

- Schedule savings during Construction – MEP and S trades can produce shop drawings directly from a fully coordinated 3D model resulting in expedited submittal approval process.

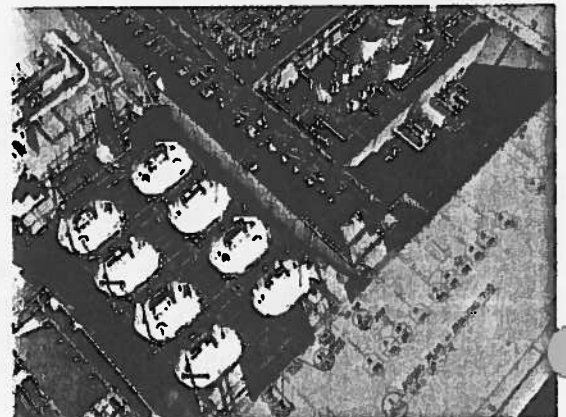
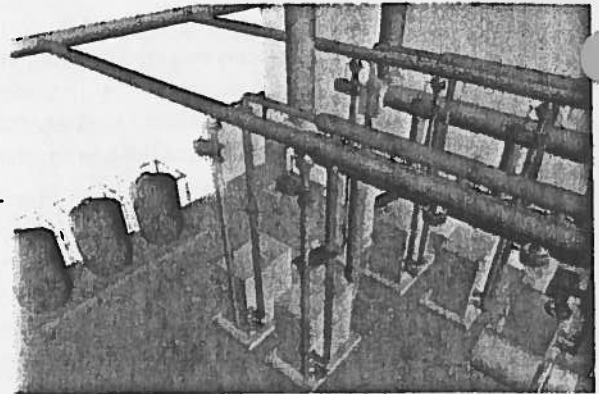
Long-term benefits to owners: Saving Operating and Maintenance Dollars

Renee Tietjen, Senior Architect, U.S. Department of Veterans Affairs, correctly observes that “The ability of an owner to reuse data instead of paying to continually recreate or reformat information for new uses during the facility lifecycle is one of the most compelling reasons for owners to advocate for true interoperability: a common international data exchange standard that enables data to be imported and exported by any software system, at any time.”

- As-Built Documentation and Model - As-builts for the A/E can be captured as the project progresses from the red-line drawings. This allows the A/E to turn over fully reconciled as-built documents sooner to the facilities personnel.
- Operations & Maintenance (O&M) Manuals - O&M manual data can be embedded into the model.
- Computer Aided Facilities Management (CAFM)/Computerized Maintenance Management Systems (CMMS) – The BIM can form the basis of the CAFM/CMMS.

Broaddus & Associates’ past experience with the implementation of BIM on design and construction projects has taught us that attention in the following areas during pre-design, design, construction, and post-occupancy adds significant value and reduced cost to the resulting BIM. Our staff is available to work with the client on the BIM implementation on the project and would anticipate the following types of tasks:

- Early determination of owner goals – Owners are driving the transition to BIM among design professionals. Understanding the owner’s deliverables goals and software system choices with regard to BIM is key in the assuring that the model that is produced meets those expectations. With new opportunities on the horizon, such as automated code checking through BIM, these goals will be constantly evolving.
- Early establishment of BIM standards – The marketplace today with regard to BIM capable building design consultants and contractors is in transition. Many large architecture firms have fully adopted BIM as have many large engineering firms. However all have not and those which have are using multiple software platforms which are fully interoperable. Some firms continue to use 2D CAD. Broaddus & Associates strongly recommends the requirement of use of software producing BIMs based on Industry Foundation Class data transfer standards championed by the buildingSMART Alliance.
- Early establishment of CAFM/CMMS standards/approach – Knowledge that a specific CAFM/CMMS system is to “receive” BIM information from the build team is essential to providing a BIM with compatible data structures. While translation software such as NavisWorks exist, nothing will compare with native information transfer. Risks exist, however, with tailoring standards for a BIM around proprietary requirements of an owner’s existing CAFM/CMMS system that may or may not be in use four or five years in the future. Again, use of open standards for data transfer such as industry foundation classes is the best approach for assuring future compatibility.
- BIM implementation specification – The owner’s goals, BIM standards, and CAFM/CMMS approach need to be written into a complete technical specification which fully describes the BIM to be produced. This is the “pre-project plan” for BIM.
- Selection of project delivery method - The decision to use BIM opens the door to the use of Integrated Project Delivery Systems (IPD). This contracting form, described fully in the AIA’s Integrated Project Delivery: A Guide released in November of 2007, is centered around the use of BIM. While BIM can be used in any delivery system, IPD is dependent upon its implementation. The AIA released two new series of contract forms in May of 2008. Early introduction of subcontractors with BIM expertise has proven valuable in the MEP trades. Decisions to solicit this type of participation should be made early.
- Staffing for BIM coordination – Broaddus & Associates has recognized the value of having an individual assigned to each



project who is knowledgeable in the development BIM implementation specifications, RFPs, contract language, consultant selection, model integration and maintenance, clash detection administration, CAFM/CMMS, etc. An individual or firm with these capabilities should be selected and tasked with BIM coordination throughout the job.

- Fully developed and coordinated contract language – Knowledge of the project delivery method is important because it defines the entities that will be involved in the project, their respective roles, and relationships. These players' contracts, as well as that of the BIM coordinator noted in the previous paragraph, will require language referencing:
 - Owner's goals with respect to BIM deliverables, BIM standards, and requirements for software and interoperability
 - The project BIM Implementation specification
 - Definitions of each party's BIM roles and responsibilities
 - Risk sharing and indemnification

This language must be developed/customized for the specific project and placed in the RFP solicitation and contracts for each build team member. Proposals, pricing and contracts must be based on a complete BIM specification.



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 FACILITIES DEPARTMENT
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 FAX (956) 318-7285

November 17, 2010

Dr. Rene Gutierrez,
 Superintendent of Schools

Mario Salinas
 Assistant Superintendent
 of Administration

*

Robert Estrada A.I.A.
 District Architect

Heraldo Perez, Jr.
 Project Manager

Norma Salinas
 Facilities Secretary

Gilbert O. Gallegos, AIA
 Vice-President Broadus & Associates
 1100 E. Jasmine Suite 102
 McAllen, Texas 78501

Dear Mr. Gallegos:

As District Architect I have learned that the people involved in delivering a project have the most important influence on the project's success.

The Broadus & Associates team's leadership exceeded our expectations. With your assistance we ended up with good design/construction teams that were able to partner and work together effectively. Your approach to open communication and problem resolution helped to eliminate the typical project conflicts and slowdowns that occur on most construction jobs.

Our facilities have been completed and opened on-time thanks to the professional leadership of the Broadus & Associates team. The cost savings that resulted from both mass purchasing and replication of building types have made determining how to utilize those savings my most difficult task.

Based on my experience, I would not only hire Broadus & Associates to manage my next facility, but I would recommend Broadus & Associates to any company or organization with similar needs.

If I can provide any additional information, please feel free to contact me at 956-380-8920.

Sincerely,

Robert Estrada, AIA
 District Architect
 Edinburg CISD - Facilities Department



EDINBURG
 CONSOLIDATED INDEPENDENT SCHOOL DISTRICT
 DRAWER 600
 EDINBURG, TEXAS 78540-0990
 Phone: (956) 289-2300 Fax: (956) 383-3676

November 17, 2010

Gilbert Gallegos, AIA
 Senior Vice President
 Broadus & Associates
 1301 S. Capital of Texas Highway
 Suite A-302
 Austin, Texas 78749

Dear Gilbert:

I want to congratulate Broadus & Associates on the outstanding job you are doing on our \$11,900,000 capital improvement bond program. With the bond projects approximately 80% complete, and seven of eleven campuses and/or buildings already turned over for use, we are extremely satisfied with your firm's work. Your firm has exceeded our expectations in providing the leadership to guide our Board, Bond Oversight Committee, Administration, staff and all stakeholders through this process. The community's goal has been to be as transparent as possible and the inclusion of Construction Management at Risk as a project delivery has allowed us to maximize local participation and return savings back to the ECISD.

The extremely tight schedules we required presented a great challenge right from the start. We needed three entire new elementary school campuses to finish construction within twelve months. Your firm led the design and construction teams to timely completion despite several unforeseeable issues, and we had 1,850 students in brand-new facilities on the first day of the semester. I am pleased to compliment you on having the fourth elementary school several months ahead of schedule for its turnover, as well.

As you know, these are very complex buildings with state-of-the-art energy management systems and completely current information technology systems. These systems are functioning optimally and our staff is having no problems with their operation. In addition to the three new elementary schools, the middle school additions and the new Fine Arts facilities that have been turned over for use are all operating as expected.

Most importantly, we appreciate your innovative approach that gave us options on how to maximize value thus allowing us to not compromise quality, add scope, and otherwise pay for more out of this Bond Program. This reason alone reinforced our decision to select your firm. Thanks to your program management team the bond program has been a huge success, and thus your participation in the bond program has enhanced our (ECISD) credibility with our community.

Please feel free to contact me at 956.289.2302 should you require further information.

Sincerely,

Mario Salinas, Assistant Superintendent
 Edinburg Consolidated Independent School District

ADDENDA CHECKLIST

Any addenda issued by STC to this RFQ will become part of the RFQ. Addenda will be numbered sequentially. Respondent must indicate on this sheet the receipt of any and all addenda.

Receipt is hereby acknowledged of the following addenda to this RFQ.

No. 1 X 1/22/14

No. 2 X 1/28/14

No. 3 X 1/30/14

No. 4 _____

Company/Entity Name: Broadus & Associates

Robert Mallegan
Authorized Signature

EXECUTION OF OFFER

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER WITH THE STATEMENT OF QUALIFICATIONS MAY RESULT IN REJECTION THE QUALIFICATIONS.

In compliance with this solicitation, and subject to all the conditions herein, the undersigned offers and agrees to furnish the products and/or services described in its Statement of Qualifications. Failure to sign the offer, or signing it with a false statement, shall void the submitted offer or any resulting contract, and the Respondent may be removed from STC vendor lists.

By signature hereon, the Respondent acknowledges and agrees that 1) this is a solicitation for qualifications and is not a contract or an offer to contract; 2) the submission of a statement of qualifications by Respondent in response to this solicitation will not create a contract between respondent STC and Respondent; and 3) STC has made no representation or warranty, written or oral, that one or more contracts with STC will be awarded under this solicitation.

By signature hereon, the Respondent hereby certifies that it is not currently delinquent in the payment of any franchise taxes owed the State of Texas under Chapter 171, Tax Code, if applicable.

By signature hereon, the Respondent hereby certifies that it is not debarred, suspended or otherwise declared ineligible for 1) participation in federal programs (pursuant to 24 CFR 84.13), or 2) doing business with the State of Texas.

By executing this offer, Respondent affirms that he/she has not given, offered to give, nor intends to give at anytime hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer.

By the signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership, or institution represented by the Respondent or anyone acting for such firm, corporation, or institution has violated the antitrust laws of the State of Texas, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the offer made to any competitor or any other person engaged in such line of business.

By signature hereon, Respondent certifies that the individual signing this document and the documents made part of this solicitation is authorized to sign such documents on behalf of the company and to bind the company under any contract which may result from the submission of this proposal.

By signature hereon, Respondent affirms that he has not prepared, or assisted in the preparation of, the specifications or other requirements for this solicitation.

By signature hereon, Respondent signifies his compliance with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action.

By signature hereon, Respondent signifies his compliance with requirements of the Drug-Free Workplace Act of 1988.

By signature hereon, Respondent represents and warrants that it is a reputable company regularly engaged in providing the products and/or services necessary to meet the terms, conditions and requirements of this solicitation.

Proposal must include Taxpayer Identification Number, full firm name and address of Respondent. Failure to manually sign proposal will disqualify it. The person signing the proposal should show title or authority to bind his/her firm in contract.

Taxpayer Identification Number: _____

Respondent/Company: Broaddus & Associates

Signature: *Gilbert Gallegos*

Name (Typed/Printed): Gilbert Gallegos, AIA

Title: Senior Vice President

Street: 1100 E. Jasmine Avenue, Suite 102

City/State/Zip: McAllen, Texas 78501

Telephone No.: 956-688-2307

Fax No.: 956-688-2315

SOUTH TEXAS COLLEGE

TO BE SUBMITTED WITH BID/PROPOSAL/QUOTE

State of Texas legislative Bill No. 1 Section 4.034, Notification of Criminal History, Subsection (a) states " a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony."

Subsection (b) states " a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract."

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY-HELD CORPORATION

Please check off one box and sign the form in the appropriate space

I, the undersigned agent for the firm named below, certify; that the information concerning notification of felony convictions has been reviewed by me and the information furnished is true to the best of my knowledge.

VENDOR'S NAME: Broaddus & Associates

AUTHORIZED COMPANY OFFICIAL'S NAME (PRINTED): Gilbert Gallegos, AIA

[] A. My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.

SIGNATURE OF COMPANY OFFICIAL

[X] B. My firm is not owned nor operated by anyone who has been convicted of a felony.

SIGNATURE OF COMPANY OFFICIAL Gilbert Gallegos

[] C. My firm is owned and/or operated by the following individual(s) who has/have been convicted of a felony:

Name of Felon(s)

Details of Conviction(s)

SIGNATURE OF COMPANY OFFICIAL Gilbert Gallegos

CONFLICT OF INTEREST QUESTIONNAIRE

FORM CIQ

For vendor or other person doing business with local governmental entity

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session. This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

N/A

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

N/A

Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

Robert Mallegan

Signature of person doing business with the governmental entity

February 4, 2014

Date

Adopted 06/29/2007

3.
Agreement between
Owner and
Consultant for
Construction Program
Management
Services

AGREEMENT
between
OWNER AND CONSULTANT
for
CONSTRUCTION PROGRAM MANAGEMENT SERVICES

THIS AGREEMENT is made as of August 27, 2014, between South Texas College (herein "Owner") and Broaddus & Associates (herein "Consultant").

Owner and Consultant, in consideration of their mutual considerations as set forth herein, agree as follows:

I. Parties, Purpose, Term & Definitions

- A. Parties. Owner is a college, a political subdivision of the State of Texas, and a "district" as that term is defined in the Texas Education Code. Consultant is a Texas corporation consisting of registered architects and engineers and professional project managers that engages in the business of providing construction program advisory and management services (as hereinafter defined) to facilities owners such as Owner.
- B. Purpose. Owner engages the Consultant as its Construction Program Manager for Owner's Bond Construction Program (the "Program"). As Construction Program Manager, the Consultant will assist the Owner in an advisory capacity and serve as owner's representative, on matters that impact the Program, during the planning phase for the Bond Construction Program and the design and construction phases of each Project under the Program. The Construction Program Manager's Basic Services relate to complete oversight of the development and implementation of the Owner's Bond Construction Program across the multiple Construction Projects in the Program, including a program-wide budget and schedule; and establishing quality control guidelines.
- C. Term. The term of this contract is anticipated to be thirty-eight months from the date of execution, subject to modifications and adjustments due to unforeseen circumstances, which may occur during the Bond Program Projects.
- D. Definitions.
1. "Basic Services" are the enumerated services under Scope of Services to be provided by the Consultant and do not include those services identified as Additional Services.
 2. "Bond Construction Program" means the Owner's comprehensive, multi-year planning, design and construction of Projects to be undertaken with proceeds of its bond proceeds as described in Exhibit "B".
 3. "Construction Program Management," means a comprehensive array of consulting and advisory services provided to the Owner by a firm and team of sub-consultants, whose ultimate goal is to accomplish a series of construction projects, including, assisting and advising Owner, and service as Owner's

representative, regarding the following matters: (1) the allocation of financial resources for the eventual construction project(s), (2) the planning of land uses and support of infrastructural facilities for the project(s), (3) the confirmation and implementation of a conceptual master plan in connection with design, construction and equipping of the project(s), (4) the development and coordination of the processes for selection of the architects, engineers and other design professionals, (5) the coordination and oversight for design of the project(s), (6) the development and coordination of the processes for procurement of contractors, (7) the oversight of the construction process for each of the project(s) and start-up and occupancy of each project.

4. "Design Guidelines" refers to Owner's previously prepared in-house design standards and guidelines and specific design objectives and instructions issued to its staff, architects, engineers and contractors for the purpose of influencing initial capital construction costs, as well as life-cycle operation and maintenance costs.
5. "Facility Standards" refers to Owner's previously prepared in-house facility standards for facility construction, equipment and systems, modified from time to time, for the purpose of increasing efficiency and productivity of Owner's facilities and influencing facilities' long term-operation and maintenance costs.
6. "Project" or "Construction Project" refers to each individual construction contract for each individual facility and related work undertaken at a project site under a separate contract between Owner and a general contractor. Owner anticipates undertaking the Bond Construction Program projects at its campuses as described herein.
7. "Scope of Services" refers to the array of advisory and consultant services to be provided by the Consultant under this Contract.
8. "Termination" refers to cessation or conclusion of performance of a party's obligation under this Agreement prior to obligation being completed and when written notice has been expressly provided whether by Owner or Consultant.

II. General Program Information

A. Anticipated Master Schedule.

Owner's preliminary Master Schedule containing anticipated scheduling information, program duration, milestones, commencement, completion, occupancy and other critical scheduling information, subject to finalization, is incorporated herein as Exhibit "A".

B. Location and Description of Projects.

The location and description of construction projects are contained in Owner's List of Proposed Projects (which is subject to modification), incorporated herein as Exhibit "B".

C. Budget.

Owner has allocated the sum of \$159,028,940 from its Series 2014 Limited Tax

Bonds for its Bond Construction Program and future bond issues. The budget allocation to each of the Projects, subject to final approval is contained in Exhibit "B".

D. Design and Construction Procurement.

Owner intends to use the traditional design method by contracting professional design services with architects and engineers, and procure construction services using the Construction Manager at Risk and Competitive Sealed Proposals methods as defined in Texas Government Code 2269.

III. Consultant's Representations

- A. The Consultant shall perform its services consistent with the skill and care ordinarily provided by Program Management under the same or similar circumstances. The Consultant shall perform its services as expeditiously as is consistent with such skill and care and the orderly progress of the Program.
- B. The Consultant shall provide its services in cooperation with the services provided by the Owner and the Owner's other consultants and contractors and shall coordinate its services with those services provided by the Owner and the Owner's other consultants and contractors with standards consistent with ordinary prudent standards.
- C. The Consultant's services shall be completed in accordance with the Bond Construction Program Master Schedule. Time is of the essence in the performance by the Consultant, the design professionals and the construction contractors. The parties acknowledge that the Master Schedule timeline is reasonable under the circumstances if services of the Consultant and the work of the design professional and the construction contractors is planned and coordinated efficiently. The timely and efficient performance by the Consultant of the Construction Program Management Services and final completion of the Bond Program in accordance with the Master Schedule are critical criteria relied upon by Owner to contract with Consultant hereunder.
- D. The Consultant represents that each of its employees and sub-consultants identified in its response to Owner's Request For Qualifications No. 13-14-1036 is a key member of Consultant's team. Consultant shall not change its key staff members or engaged sub-consultants without notice to Owner and Owner's consent.
- E. Except with Owner's knowledge and consent, the Consultant shall not engage in any activity, or accept any employment, interest or contribution that would reasonably appear to compromise the Consultant's judgment.
- F. Consultant shall maintain records of the allocation of funds to projects, commencing with initial project budgets through final cost, and provide Owner reports at regular intervals and upon completion of the program.
- G. The Consultant shall provide cost estimating services, eliminating it from the Basic Services typically provided under an Architect's contract. Having the Consultant as central cost estimating control point for all of the Owner's construction will help provide consistent cost estimating and cost control.

IV. Consultant's Basic Services

A. The Consultant's Basic Services consists of those services performed by the Consultant as set out in Exhibit "C", Program Management Services. The following conditions shall apply:

1. The Construction Phase for a Project shall be considered complete when a Project under this agreement has been finally accepted and final payment to the contractor has been authorized. The Bond Construction Program shall be complete when the last Project in the Program is finally accepted and final payment to the contractor has been authorized.
2. The Consultant's Basic Services shall be provided for each phase of the Projects in the Bond Construction Program as set out in Exhibit "C" attached hereto. It is not the intent of the Parties to relieve the architects, engineers or other design professionals of their design and construction administration responsibilities, except as herein provided.
3. The Consultant's costs to be incurred in connection with providing Basic Services are payable under the lump sum fee. Unless expressly excepted herein, Consultant's costs include, but are not limited to, required travel, shipping costs, supplies and materials, office administration and overhead, copying, printing, telecommunications and all other costs, including fees and costs for sub-consultants engaged by Consultant to perform its Basic Services.

Consultant's Basic Services includes the coordination, management and oversight of other consultants engaged directly by Owner for unique or specialized areas of design.

B. The following chart titled "Responsibility and Scope of Services", illustrates generally, in the left hand column, the categories of services to be provided by the Consultant, the sequence of when those services are provided and how those services will interrelate with the services of other design professionals during the Design Phase and the Construction Phase and with contractors during the Construction Phase. This enumeration of Consultant's services in no way limits the duties and obligations of the Consultant which may be set out in more detail elsewhere herein and in Exhibit "C" attached hereto.

RESPONSIBILITY AND SCOPE OF SERVICES	
CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Mobilization	
<ul style="list-style-type: none"> • Office staff, implement communication systems, secure offices and other expenses 	<ul style="list-style-type: none"> • Not Applicable
General Program Management Requirements	
<ul style="list-style-type: none"> • Serve as single point of contact for the Owner. • Conduct partnering and kickoff meetings with Owner, Architects, Engineers and Contractors per campus or project; • Update and track program plan for each campus to include design schedule, team members, meeting schedules, construction schedule, budget, cost estimates, progress report formats, format for document management for all phases; • Prepare and submit status reports on a monthly basis for presentation to the College's Administration and Board of Trustees • Provide customer interfacing to resolve issues, provide guidance and insight, and the address concerns, if applicable. Execute and oversee quality assurance program in order to protect interest of Owner • Conduct regular meetings with College's Facilities Planning & Construction staff for review of overall program status and address matters needing direction and/or resolution • Become familiar with index of terms for master filing of all projects including e-mailed files and AutoCADD 2014 version files 	<ul style="list-style-type: none"> • Not Applicable

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
General Program Management Requirements	
<ul style="list-style-type: none"> • Become familiar with and manage compliance with the following: <ul style="list-style-type: none"> ○ The college's master plans per campus included in program ○ ○ The college's facilities space programs for each project in program ○ The college's facilities design standards and guidelines ○ The college's space standards and technical requirements ○ The college's overall program budget and related detail 	<ul style="list-style-type: none"> • Not Applicable
<ul style="list-style-type: none"> • Implement and manage an internet accessible electronic file management and reporting system to be used for updates throughout the program management period • Program management team will include, but not be limited to, the following members and responsibilities <ul style="list-style-type: none"> ○ Program management executive ○ Assistant program manager(s) ○ Administrative coordinator(s)/assistant(s) ○ Program documents manager ○ Cost estimator/budget manager ○ Plan reviewer(s) ○ Construction inspector(s) 	<ul style="list-style-type: none"> • Not Applicable
Architect-Engineer Selection	
<ul style="list-style-type: none"> • Assist with criteria, solicitation, evaluation, selection and assignments of potential design team(s) who are qualified and capable of performing the scope of work and meet program schedules, consistent with College's plans and policies. • Negotiate with the selected firms and assist in A-E contract preparation and review. 	<ul style="list-style-type: none"> • Not Applicable

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Implement Space Program Requirements	
<ul style="list-style-type: none"> • Conduct meetings with staff to update and confirm space programming needs including technical requirements such as telecommunication systems, special equipment and furniture needs and provide data to architects • Communicate the College's Space standards to direct design teams on the use of standards for each proposed facility 	<ul style="list-style-type: none"> • Not Applicable
Schematic Design Phase	
<ul style="list-style-type: none"> • Conduct partnering meetings and kickoff meetings with Owner and A-E firms per campus or project • Communicate all project planning information to Architects and/or Engineers • Conduct weekly or bi-weekly project design meetings between Owner and Architect • Conduct review of project schedules and conduct schedule optimization sessions(s) and Project Definition Rating Index Evaluations • Submit to Owner a Conceptual Cost Estimate based on current area, volume or other unit costs • Conduct cost estimates and take action to keep cost under control • Provide an ongoing Constructability Program, complete with documented cost savings and value-added impacts • Coordinate, review, evaluate and recommend approval of all schematic design documents submitted by architects and engineers for compliance with Owner's design standards and guidelines, space program needs and performance specifications per project 	<ul style="list-style-type: none"> • Review program furnished by owner to ascertain requirements of Project and arrive at mutual understanding & provide preliminary evaluation of program, budget & schedule requirements. • Prepare schematic design documents. • Present schematic design documents for review and approval.

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Schematic Design Phase	
<ul style="list-style-type: none"> • Check for compliance with STC’s design guidelines and space program needs per campus • Review construction documents for compliance with program requirements and completeness 	
Design Development Phase	
<ul style="list-style-type: none"> • Continue weekly or bi-weekly meetings between Owner, Architects, Engineers and Contractors to Ensure Architect is achieving required level of detail, particularly in mechanical and electrical systems review and evaluate design documents for compliance with guidelines • Develop a schedule for Design Development stage and conduct Schedule Optimization session and Project Definition Rating index evaluations • Advise Owner of any adjustments to Baseline Cost Estimates • Conduct more detailed cost estimates, including independent estimate at end of Design Development provide Owner with a detailed report and take action to keep cost within construction budget limitations without compromising standards and quality of construction • Coordinate plan reviews as required by Texas Department of Licensing and Regulation for compliance with American with Disabilities Act 	<ul style="list-style-type: none"> • Prepare Design Development Documents addressing architectural, structural, mechanical & electrical systems, materials and other appropriate elements.

RESPONSIBILITY AND SCOPE OF SERVICES

**CONSTRUCTION PROGRAM
MANAGEMENT SERVICES**

**ARCHITECTURAL AND ENGINEERING
SERVICES**

Design Development Phase

- Coordinate, review and evaluate all design development documents submitted by architects and engineers for compliance with STC's design guidelines, detailed program needs and performance specifications per campus
- Check for compliance with STC's design guidelines and space program needs per campus
- Review construction documents for compliance with program requirements and completeness
- Coordinate and review geotechnical investigation reports for each applicable project

Construction Document Phase

- | | |
|--|---|
| <ul style="list-style-type: none"> • Continue design review meetings either on site or through video conferencing • Conduct project management meetings with Owner to update on progress, financial status, construction issues and use of project contingencies • Advise Owner on any adjustment to Construction Cost Estimates • Develop schedule for plan reviews at 25%, 50%, 75% and 95% of completeness • Coordinate with STC staff for review and discussion at various levels of completeness for compliance with STC's design guidelines and detailed program needs per campus before proceeding with construction • Coordinate, review, evaluate and recommend approval of all final construction documents submitted by architects and consultant engineers | <ul style="list-style-type: none"> • Prepare Construction Documents consisting of drawings and specs detailing construction requirements suitable for construction contractor use, and to document the constructed facility (modification to be detailed by the general contractor.) • Coordinate and review drawings including significant changes during construction based on marked-up prints, drawings and other data. • Assist Owner in filing documents for governmental approval by preparing and submitting permit requests, etc... |
|--|---|

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Construction Document Phase	
<ul style="list-style-type: none"> • Coordinate with government entities for advanced building permit reviews, and other approvals 	<ul style="list-style-type: none"> • Prepare necessary bidding information, bidding requirements of contractor and owner's standard Owner/Contractor Contract for review and approval by owner.
Construction Procurement Phase	
<ul style="list-style-type: none"> • Assist owner with updates to contractor selection criteria if needed • Assist with solicitation, evaluation and selection of potential contractors who are qualified and capable of performing the scope of work, controlling cost, meeting schedules, programming guidelines and specifications • Assist in preparation of contracts and contract negotiations • Assist Owner with re-solicitation if necessary • After selection and approval of contractor by owner, assist Architect with transmitting construction contract documents to contractor(s) • Request and review information submitted by contractor to include insurance, employee pay scales, subcontractors list, bonds, and insurances 	<ul style="list-style-type: none"> • Provide Owner with necessary modifications to construction documents for Project if cost is greater than Project budget.
Construction Phase	
<ul style="list-style-type: none"> • Serve as the Owner's Point of Contact during construction • Conduct Partnering sessions at the beginning of each Project and conduct periodic update sessions as needed • Conduct Construction update meetings at construction sites as scheduled 	<ul style="list-style-type: none"> • Generate proposed Change Orders and Construction Change Directives; order minor changes. • Make visits to the site for compliance with (not exhaustive or continuous on-site inspections). Inform Owner of work progress; notify Owner of defects, reject non-conforming work

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Construction Phase	
<ul style="list-style-type: none"> • Review required documents from contractor including, Building Permits, Safety Plan, and Environmental Compliance plan, and report to architect and owner • Review Contractor cost control plan with Architect and Owner • Evaluate requests for proposed Change Orders and Construction Change Directives and make recommendations • Review materials testing reports and services during all applicable phases • Conduct periodic site visits to review work in place and report in a standard format to Owner with reference to construction documents, schedules and budgets • Monitor construction progress and advise Owner of any observations of non-conforming scope of quality workmanship • Assist Owner in contracting with Independent Testing Firms and review testing program results • Administer Construction Contract and General Conditions and act as Owner's representative • Act as conduit between Architect and Contractor to review compliance with all plans, specifications and require terms and conditions and report to Owner on status • Review construction submittal and obtain Owner's approval as needed • Monitor Requests for Information and A-E responsiveness • Review Contractor's Building Commissioning and Turnover Plan 	<ul style="list-style-type: none"> • Extent of duties, responsibilities & limitations of authority of the Architect as Owner's representative during construction shall not be modified or extended w/o written Contract of the Owner & Architect w/ consent of Contractor. • Review inspection or testing of the Work – fabricated, installed or to be completed and report results to owner. • Approve or reject submittals from the Contractor. • Respond to Requests for Information from the contractor and advise the Owner • Determine amounts owed to the Contractor based on site observations & Contractor's Applications for Payment & issue Certificates for Payment. • Perform final inspections and generate punch list. • Conduct inspections to determine the dates of Substantial and Final Completion, issue Final Certificate of Payment, submit to the Owner upon Final Completion a letter that work has been completed in total in accordance with Contract Documents, to the best of his knowledge;

RESPONSIBILITY AND SCOPE OF SERVICES

CONSTRUCTION PROGRAM MANAGEMENT SERVICES	ARCHITECTURAL AND ENGINEERING SERVICES
Construction Phase	
<ul style="list-style-type: none"> • Evaluate payment applications and make recommendations on approval of requests for progress payments • Perform substantial completion inspections and work with A/E team to prepare punch lists • Perform final inspections and review punch list work • Conduct periodic program management meetings with owner for updates on progress, budget status and construction matters • Ensure overall contractor compliance with terms and conditions of construction contract 	
Commissioning/Warranty/Occupancy	
<ul style="list-style-type: none"> • Coordinate with furniture and equipment consultants to plan, implement procurement, installation and turnover • Coordinate with contractor to perform HVAC Testing and Balancing as needed • Review the results of the HVAC Testing and Balancing for compliance with construction contract documents requirements • Oversee delivery of all certification documentation to proper agencies on behalf of owner • Coordinate training of facility maintenance staff for familiarization with all systems • Coordinate delivery of all completed as built drawings 	<ul style="list-style-type: none"> • Receive from contractor and forward to owner all completed HVAC test and balance reports. • Verifies that all certification inspections are executed and documentation is provided to the Owner. • Receive and forward to the Owner written warranties and related documents required by Contract Documents.

- C. Notwithstanding the foregoing, under Basic Services, Consultant shall also have coordination and oversight responsibilities as follows:
1. Consultant's sub-consultants and other consultants' work (whether engaged by Owner or Owner's design professionals) as needed or as required to perform design of specialized or unique building spaces and building systems as needed. This includes sub-consultants whether or not their work was included in the Consultant's contract or the architect's and engineer's contracts.
 2. Coordination and oversight for procurement of specialized design sub-consultants to provide services in areas of unique or specialized building systems. These specialized areas include, but are not limited to, the following building systems:
 - a. Mechanical systems controls;
 - b. Thermal plant systems and equipment;
 - c. Postsecondary nursing and allied health training lab systems and equipment;
 - d. Postsecondary science, technology, engineering and math facility systems and equipment;
 - e. Law enforcement training lab systems and equipment;
 - f. Manufacturing industry training lab systems and equipment;
 - g. Academic libraries;
 - h. Audio-visual systems and equipment;
 - i. Telecommunications technology systems and equipment;
 - j. Student life and student activities and cafeteria facility systems and equipment;
 - k. Security systems and equipment;
 - l. Acoustics;
 - m. Other specialized learning/classroom facilities including, learning studios and active learning classrooms
- D. The Consultant shall supply, free of charge, to Owner and each architect, engineer, consultant, contractor and sub-contractor who shall be engaged to perform services or work in conjunction with the program, Consultant's "Owner In-site" software. The Parties agree that the delivery of this product, as herein provided, along with its licensing or authorization, as necessary to permit its use, constitutes an element of the Consultant's Basic Services. This obligation shall include any updates and upgrades through the completion of the Program.

- E. The Consultant shall provide as a Basic Service, to Owner, any data collected or created for purposes of three dimensional space programming and Building Information Modeling software application.

V. Consultant's Additional Services and Costs

A. Basic Services Costs

It shall be presumed that, unless expressly provided, all costs incurred by Consultant in connection with or related to its performance of services under the Bond Construction Program are necessary in performing its Basic Services. Similarly, Owner shall not be liable for any cost or expense incurred by Consultant or for additional fees for additional services unless authorized in advance by Owner.

B. Advanced Authorization Required

If authorized by the Owner in advance in writing, Consultant shall itself furnish or obtain from third parties, Additional Services of the types listed below, litigation or arbitration.

C. Additional Services

1. Services resulting from significant changes or unanticipated scope, extent, or character.
2. Investigations and studies in addition to those specified in Basic Services.
3. Service as a consultant or witness for Owner in any litigation, arbitration, or other dispute resolution process related to the Program, wherein it is undisputed that the Consultant's performance of its services are not at issue in the dispute, litigation or arbitration.
4. Construction Program accounting services by use of Owner In-Site software.
5. Coordination of facilities management data and documents by use of Building Information Modeling facilities management software.

D. Increase in Scope of Work/Additional Services

1. Owner retains the discretion to increase the Scope of Work hereunder, without additional fees to Consultant, subject to the following conditions;
 - a. If the additional work is limited to the campus projects designated in the Bond Construction Program,
 - b. The additional work, in the aggregate does not exceed the amount of five percent of the total amount of the Original Bond Program,
 - c. Owner gives Consultant notice of the additional work prior to March 13, 2016 and
 - d. The Consultant's services can be fully performed prior to Bond Construction Program completion date as modified in section V.D.3. Consultant shall be obligated to perform its services in the increased Scope of Work in accordance with the terms of this Agreement.

2. Any increase to Scope of Work or budget in excess of five percent of the original Bond Construction Program amount, shall constitute additional services and entitle the Consultant to additional fees.
3. The following delays or changes do not constitute an increase in Scope of Work for which Additional Fees or compensation is required:
 - a. A delay in completion of the Bond Construction Program which does not exceed ninety (90) days;
 - b. A change in the plans or construction essential to the completion of the original Bond Construction Program.

VI. Owner's Responsibilities

- A. In addition to other responsibilities of Owner as set forth in this Agreement, Owner shall:
 1. Provide to Consultant for consideration by Consultant in performing its duties under the Contract, Owner's requirements for the Program and Projects, including Design Guidelines, Facilities Standards, space programs, technical requirements, technology requirements, security needs, and budgetary limitations. Consultant shall inform owner of any recommended deviations from the current facilities standards.
 2. Furnish copies of Owner's standard forms, conditions, and related documents for inclusion in the Program.
 3. Furnish Consultant any other available information pertinent to the Program, including any reports and data relative to previous design efforts, or investigations at or adjacent to the Project sites.

VII. Times for Rendering Services

- A. Consultant's services and compensation under this Agreement have been agreed to in anticipation of the orderly and reasonably continuous progress of the Bond Construction Program through completion. Consultant's obligations to render services hereunder will be for the duration of the Bond Construction Program.
- B. A material and substantial change in scope, extent, or character of the Bond Construction Program, increasing the time of performance of Consultant's services by more than ninety days shall be approved in writing by Owner and equitably adjusted.
- C. The anticipated period of the Bond Construction Program will be Thirty Eight (38) months from the date of commencement, subject to modifications and adjustments due to unforeseen circumstances, which may occur during the Bond Program Projects.
- D. As part of Consultant's Pre-Project Planning Phase and determination of project delivery methods, the Consultant will develop a Master Program Schedule (MPS) that

will be the baseline for all stakeholders to monitor progress of activities and benchmarks including design professionals, contractors and community.

VIII. Payments To Consultant

A. Basic Services.

1. Payments – Consultant’s lump sum fee shall be payable monthly on the basis of the following allocations:

• Pre-project Planning Phase 10%	\$397,500
• Design Phase 40%	\$1,590,000
• Construction Phase 45%	\$1,788,750
• Closeout Phase 5%	\$198,750

Consultant’s invoice amount shall reflect reasonably estimated design and construction work completed per project to the date of the invoice.

2. Payment to Consultant during pre-project planning phase – the fee for pre-project planning as defined in Exhibit C “Pre-Project Planning Phase”, shall be Three Hundred Ninety Seven Thousand and Five Hundred Dollars and shall be allocable per project and payable on a monthly basis as work proceeds and is billed.

3. Payment to Consultant’s during all other phases - The payment for remaining phases of work through occupancy and commissioning shall be payable based on percentage of work completed per project. The compensation shall be a lump sum in the amount of Three Million Nine Hundred Seventy Five Thousand Dollars (\$3,975,000) less the Pre-Project Planning Phase fee, payable in monthly payments over the course of the Thirty Eight (38) month construction program. Consultant will submit for review and approval by the Owner, monthly invoices based on percentage of work completed per project.

B. Additional Services & Increases in Scope of Work

1. The Consultant, upon written approval by Owner, shall be entitled to additional compensation for delayed completion of the Bond Construction Program beyond ninety days of its completion date if the delay has not been caused in part by the actions of the Consultant. The additional compensation shall be based on the following:

- a. Hourly rates of Consultant’s professionals who perform the reasonably and necessary services required by the delay;
- b. Hourly Rates of Consultants. Compensation for Additional Services shall be based on hourly rates for each Consultant’s staff member as identified in Exhibit “D”.
- c. The time necessary to complete the work;

2. Consultant shall submit a written Cost Proposal to Owner and receive approval in writing in order to increase Scope of Work.
- C. Reimbursable Expenses. Owner shall pay Consultant solely for the following categories of Reimbursable Expenses at actual cost thereof: printing of drawings and other documents necessary for Owner's review and records and the Consultant's own use and cost of legal advertisements authorized by Owner. Any other reimbursable costs or expenses for which Consultant shall seek reimbursement shall require prior written approval by the Owner.
- D. Other Provisions Concerning Payments
1. Preparation of Invoices - Invoices will be prepared in a form mutually agreeable to Owner and Consultant and calculated on the basis set forth herein and submitted to Owner on the 5th of each month.
 2. Payment of Invoices - Invoices are due and payable within 30 days of receipt.
 3. Disputed Invoices - In the event of a disputed or contested invoice, only that portion so contested may be withheld from payment, and the undisputed portion will be paid.
 4. Payment Upon Termination of Consultant's services - In the event of termination of Consultant's services, for any cause or no cause, under this Agreement, Consultant will be entitled to payment only for services actually performed or furnished plus Reimbursable Expenses if any, incurred through the effective date of termination.
 5. Disputed Invoices and Payment - Owner may dispute any portion of any invoice submitted by Consultant by providing written notice thereof. Owner may withhold payment of the disputed portion of an invoice upon written notice thereof to Consultant.

IX. General Conditions

A. Suspension and Termination

This Agreement may be terminated as follows:

1. Termination by Consultant for Cause. Consultant may terminate this agreement upon Owner's failure to perform its obligations under the Contract. Consultant shall provide Owner written notice of nonperformance upon which Owner shall have the right to cure within thirty days, or to otherwise undertake reasonable measures to perform. Failure by Owner to timely cure, or otherwise undertake reasonable measures to perform as approved by Consultant shall constitute a breach of the Contract.
2. Termination by Owner for Cause Owner may terminate this agreement upon Consultant's failure to perform its obligations under the Contract. Owner shall

provide Consultant written notice of nonperformance upon which Consultant shall have the right to cure within thirty days, or otherwise undertake reasonable measures to perform. Failure by Consultant to timely cure or otherwise undertake reasonable measures to perform shall constitute a breach of contract.

3. Suspension by Owner for Convenience Owner may suspend this agreement for the Owner's convenience for one period not to exceed sixty days. Any attempted suspension exceeding sixty days shall entitle Consultant to terminate the Contract.
 4. Termination by Owner for Convenience Owner may, for any reason whatsoever, or without reason, terminate this agreement. Owner shall give written notice of such termination to Consultant specifying the effective date of termination. Upon receipt of such notice, Consultant shall incur no further obligations to third parties in connection with the Contract and shall cease providing services under the Contract as of the effective date of termination.
 5. Obligations Upon Termination Consultant shall settle the liabilities and claims arising out of any terminated third party agreements. Upon termination hereunder, the Consultant shall deliver to Owner all data and documents relating to the prosecution of Consultant's work under the Contract. Thereupon, neither party shall have any further obligations to each under the Contract, except as defined in Article VIII.D.4 of this agreement.
- B. Owner's Right to Carry out the Work. If, after Owner has given Consultant notice under Article IX.A.2, the Consultant neglects to carry out the Work in accordance with the Contract and Owner declares a default, Owner may, without prejudice to other remedies, terminate the contract and correct such deficiencies.
- C. Controlling Law

This Agreement shall be governed by the laws of the State of Texas and venue shall lie in Hidalgo County, Texas.

D. Legal Resolution

1. Owner and Consultant agree to negotiate all disputes between them in good faith for a period of thirty (30) days from the date of notice of termination for cause prior to the filing of any law suit. Any applicable statute of limitations shall be tolled during such period of negotiation, and for fifteen days thereafter. Thereafter, both parties shall engage in mediation in an attempt to resolve all matters in dispute.
2. Exclusive venue of all actions concerning all claims, disputes, or matter in question between parties to this agreement shall lie in the state districts courts of Hidalgo County, Texas.

E. Indemnification and Insurance

1. To the fullest extent permitted by law, Consultant shall indemnify and hold harmless Owner, Owner's trustees, officers, directors, and employees from and against any and all claims, costs, losses, and damages (including but not limited to all fees and charges of engineers, architects, attorneys, and other professionals and all court or arbitration or other dispute resolution costs) caused by the negligent acts, failure to perform, or omissions of Consultant or Consultant's officers, directors, partners, employees, and Consultant's sub-consultants in the performance and furnishing of Consultant's services under this Agreement.
2. Consultant shall at all times throughout the term of this contract retain in effect the insurance policy attached here to as Exhibit "E".

Any notice required under this Agreement will be in writing, addressed to the appropriate party at its address on the signature page and given by fax, email, certified mail (return receipt requested), or by commercial courier service. All notices shall be effective upon the date of receipt.

F. Survival and Severability

1. All express representations, indemnification or limitations of liability made in or given in this Agreement will survive its completion or termination for any reason.
2. Any provision or part of the Agreement held to be void or unenforceable under any law or regulation shall be deemed stricken, and all remaining provisions shall continue to be valid and binding upon Owner and Consultant, who agree that the Agreement shall be reformed to replace such stricken provision or part thereof with a valid and enforceable provision that comes as close as possible to expressing the intention of the stricken provision.

X. Integrated Contract

The Contract represents the entire and integrated Contract between the parties hereto and supersedes prior negotiations, representations or Contracts, either written or oral. The Parties shall not be bound by or be liable for any statement, representation, promise, inducement or understanding of any kind or nature not set forth herein. No changes, amendments or modifications of any of the terms or conditions of the Contract shall be valid unless reduced to writing and signed by both parties. Nothing contained in the Contract shall be construed to create any contractual relationship (1) between the Owner and any subcontractor to the Consultant, (2) between the Owner and any employee or supplier of the Consultant, it being the intention of the Parties that the Consultant is an independent contractor. Any changes to the contract must be approved by the Owner's Board of Trustees.

XI. Miscellaneous

- A. Nothing contained in this Contract shall create a contractual relationship between the Owner and any person or entity other than the Consultant. The Consultant is contractually responsible and liable for the performance of his sub-consultants under this contract.
- B. Written notice shall be deemed to have been duly served if delivered in person to the individual or a member of the firm or entity or to an officer of the corporation for which it was intended, or if delivered at or sent by registered or certified mail to the last business address known to the party giving notice as follows:

Notices shall be given by the Consultant to Owner by certified mail as follows:

Shirley A. Reed, M.B.A., Ed.D.
President
South Texas College
P.O. Box 9701
McAllen, Texas 78502
(956) 872-8366

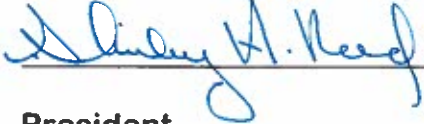
Notices shall be given by Owner to the Consultant by certified mail as follows:

James A. Broaddus, Ph.D., P.E.
President,
Broaddus & Associates, Inc.
1301 S. Capital of Texas Highway
Suite A-302
Austin, Texas 78746
(512) 329-8822

IN WITNESS WHEREOF, the parties hereto have executed this Agreement, the Effective Date of which is indicated on page 1.

OWNER:

South Texas College
Shirley A. Reed, M.B.A., Ed.D

By: 

Title: President

Address for giving notices:

3201 Pecan Boulevard

McAllen, Texas 78501

Designated Representative:

Gerardo M. Rodriguez, Jr., AIA

Title: Director of Facilities Planning & Construction

Phone Number: (956) 872-3737

Facsimile Number: (956) 872-3747

E-mail Address:

gerry@southtexascollege.edu

CONSULTANT:

Broaddus & Associates
James A. Broaddus, Ph.D, P.E.

By: 

Title: President & CEO

Address for giving notices:

1100 E Jasmine Ave Suite 102

McAllen, Texas 78501

Designated Representative:

Gilbert Gallegos, AIA

Title: Sr. VP South Texas Regional Manager

Phone Number: (956) 688-2307

Facsimile Number: (956) 688-2315

E-mail Address:

ggallegos@broaddusassociates.com



Exhibit "B"
2013 Bond Construction Program
Overall List of Proposed Projects

Construction Project Description	Proposed Square Feet	Total Project Cost
<i>Pecan Campus</i>		
Pecan Campus North Academic Building	61,267	14,843,110
Pecan Campus South Academic Building	40,000	9,454,426
Pecan Campus STEM Building	48,879	13,103,319
Pecan Campus Student Activities Building and Cafeteria	33,042	8,828,254
Pecan Campus Thermal Plant Expansion	1,440	5,542,049
Pecan Campus Parking and Site Improvements	n/a	2,490,261
Subtotal	184,628	54,261,419
<i>Nursing & Allied Health Campus</i>		
Nursing and Allied Health Campus Expansion	87,222	22,645,000
Nursing and Allied Health Campus Parking and Site Improvements	n/a	1,448,033
Subtotal	87,222	24,093,033
<i>Technology Campus</i>		
Technology Campus Southwest Building Renovation	72,000	14,583,033
Technology Campus Parking and Site Improvements	n/a	1,187,281
Subtotal	72,000	15,770,314
<i>Mid Valley Campus</i>		
Mid Valley Campus Health Professions and Science Building	76,069	19,794,354
Mid Valley Campus Workforce Training Center Expansion	10,000	1,921,739
Mid Valley Campus Library Expansion	10,369	1,882,184
Mid Valley Campus Student Services Building Expansion	14,269	2,836,391
Mid Valley Campus Thermal Plant	4,000	4,885,586
Mid Valley Campus Parking and Site Improvements	n/a	2,456,421
Subtotal	114,707	33,776,675
<i>Starr County Campus</i>		
Starr County Campus Health Professions and Science Building	48,690	12,123,842
Starr County Campus Workforce Training Center Expansion	9,302	2,050,676
Starr County Campus Library	16,516	3,376,229
Starr County Campus Student Services Building Expansion	5,000	1,034,955
Starr County Campus Student Activities Building Expansion	4,923	1,010,002
Starr County Campus Thermal Plant	4,000	4,885,584
Starr County Campus Parking and Site Improvements	n/a	1,235,739
Subtotal	88,431	25,717,027
<i>Regional Center for Public Safety Excellence - Pharr</i>		
Regional Center for Public Safety Excellence	16,000	3,974,471
Regional Center for Public Safety Excellence Parking and Site Improvements	n/a	TBD
Subtotal	16,000	3,974,471
<i>STC La Joya Teaching Site (Jimmy Carter ECHS)</i>		
La Joya Jimmy Carter Teaching Site Training Labs Improvements	11,000	1,436,000
Subtotal	11,000	1,436,000
TOTAL	573,988	159,028,940

Updated 07.23.14

**Exhibit "C" - Program Management Services
South Texas College - Scope of Services Detail**

Overall Functions for the Project

- 1 Broaddus & Associates shall provide the principal Construction Program Manager (CPM) and single point of contact for South Texas College "Owner". Services include all general leadership and management functions required of a CPM which include but are not limited to tracking budgets; managing schedules; overseeing quality of all aspects of the project; building and communicating with the project team; coordinating all issues, documentation, minutes, action items, and approvals to move the project through all its various phases; providing direct interface with the Owner's representatives and other stakeholders; and briefing executives as necessary.
- 2 Confirming and updating budget estimates for projects.
- 3 Confirm and update overall program budget including hard and soft costs. (i.e., construction, design, management, testing, furnishings, equipment, permitting, connection fees, contingency funds, etc.)
- 4 Develop a master schedule for project.
- 5 Assist in developing communication protocols for the project.
- 6 Keep Owner Executives and representatives informed and communicate with end-users to keep scope aligned with project objectives. Present to Owner Executives and representatives as required.
- 7 Establish, lead, and coordinate all project related meetings.
- 8 Install and implement the Broaddus & Associates *Owner In-Site*® Web-based Project Management System - an Owner-oriented management information system that provides any project participant the ability to track and manage the entire project.
- 9 Coordinate with all external approval authorities and regulatory agencies.
- 10 Provide Project Executive services as advisor to the Owner.
- 11 Identify the need and coordinate special studies, surveys, investigations, etc., and implement contracts as necessary.
- 12 Develop a filing and document control system for the project for hardcopy and electronic records.
- 13 Manage all contracts (Design, Construction, Special Consultants, etc.) related to each project.
- 14 Manage, review and recommend approval on all payments to consultants and contractors. Cost accounting to be provided by Owner. Will assist Owner in identification of accounting structure.
- 15 Work with the Owner Finance Office to develop cash flow projections.
- 16 Begin developing strategies for cost saving and review with Owner for approval
- 17 Assist in the solicitation, evaluation and selection of A/E and CM firms.

Continued Next Page

**Exhibit "C" - Program Management Services
South Texas College - Scope of Services Detail**

Procurement: A/E and Contractor Selection, Negotiation and Contracting

Note: The following process steps are followed, with some variation, for Design firms, CM firms, and other firms selected on a Qualifications (QBS) or Best Value Basis. The process may be used several times during the project. It may include Solicitation Document Preparation, Proposal Evaluation, Selection Committee Facilitation, Negotiation with the Selected Firm, and Preparation of the Contract Documents and Associated Documents to Implement Award of the QBS/Best Value Agreement/Contract.

- | | |
|---|---|
| 1 | Coordinate with Owner the preparation of Requests for Qualifications (RFQ's) and Requests for Proposals (RFP's), and guide Owner through fair, objective, and equitable evaluation and selection process that is appropriately documented as per higher education procurement code requirements. |
| 2 | <p>Specific activities for this phase typically include:</p> <ul style="list-style-type: none"> • Coordinate development of RFQ's documents for design-and RFP's documents for constructions • Assist in developing Agreement/Contract with Legal Counsel • Assist with organizing evaluations committee(s) • Assist with reviewing and establishing selection criteria • Assist in advertising the Request for Qualifications (RFQ) and Request for Proposals (RFP) • Receive and evaluate qualifications and proposals • Convene evaluation committee and develop a ranking list and short list of the most qualified or best value candidates • Request Proposals (RFP) from the short-list contractors • Receive and evaluate proposals • Convene evaluation committee and evaluate proposals • Coordinate interviews of short listed proposers with Board of Trustees • Facilitate Board selection of most qualified firms and best value contractors • Negotiate contract with selected firms and contractors • Finalize contract and prepare presentation material for Board and/or executive approval |
| 3 | Maintain appropriate confidentiality and comply with the Open Records process. |
| 4 | Provide the Owner's draft Agreement/Contract to include in the RFP, in order to eliminate extended negotiation of terms after selection. |
| 5 | Guide the selection process consistent with a project management approach acceptable to Owner. |
| 6 | Negotiate financial & related issues to finalize the Agreement/Contract with the selected firms and contractors |
| 7 | Coordinate with Owner to insure all procedures are in compliance with state statutes, regulations and local building codes |
| 8 | Provide follow-up and de-briefing sessions with non-selected firms if required. |
| 9 | Collect & process all required documents before proceeding with work. (i.e., bonds, insurance, etc.) |
| 10 | Issue Notices to Proceed on appropriate phases when all necessary requirements have been completed. |
| 11 | Carry out necessary contractual actions and transactions during the various contract phases. |
| 12 | Procure specialty consultants such as surveyor, geotechnical engineer, hazardous material & abatement firms, test & balance firm, commissioning agent, materials testing firms, specialized design sub-consultants and peer reviewers. |
| Construction Contractor Specific Procurement | |
| 13 | Review and assist Owner with development of standard construction contract. |
| 14 | Assist Owner with development of contractor selection criteria and review of contractor qualifications and capability to perform scope of work and comply with schedule, program guidelines and construction documents. |
| 15 | Assist Owner in negotiating with Contractors; re-bid or re-negotiate if lowest bid or proposal is greater than Project budget after selection of contractor by Owner. |
| 16 | After selection of contractor by Owner, assist Architect with transmitting standard procurement requirements to contractors and subcontractors. |
| 17 | Review information submitted by contractor to include insurance, employee pay scales, material suppliers, subcontractors list and bonds. |

Continued Next Page

**Exhibit "C" - Program Management Services
South Texas College - Scope of Services Detail**

Pre-Project Planning Phase

Site Analysis

- 1 Review all existing Owner baseline data and identify additional engineering and environmental information needed for compliance with master plan and design.
- 2 Assist in determining need/selection/procurement/contracting of consulting firms to perform the work.
- 3 Provide overall project management of each consultant and work task.
- 4 Evaluate engineering and environmental studies and apply results to the balance of the planning process.
- 5 Assist Owner in coordinating critical project issues with local governing agencies and authorities having jurisdiction.

Facility Programming

- 6 Review and update as needed building specific facility space program documents to define building specific design criteria and scope of work.
- 7 Conduct meetings if needed with users and staff to confirm the space program requirements, including but not limited to all required spaces, adjacencies, stacking diagrams, building layout, etc.
- 8 Identify building technical and engineering systems, such as communication systems, special equipment, particular utility or building support services and furniture needs.
- 9 Identify any special issues related to the site and off-site utilities not already addressed in campus master plan.
- 10 Prepare program requirements to comply with campus master plan, incorporating standards and design guidelines.
- 11 Finalize program and facilitate transmission of data to building designer.
- 12 Transmit data to Designers.

Other Pre-Project Planning Activities

- 13 Update & expand the master schedule for overall program.
- 14 Facilitate the integration of technology & telecommunications plans & budget into the program.
- 15 Conduct first Project Definition Rating Index (PDRI) analysis. (*Best Practice*)
- 16 Develop conceptual construction cost estimate by project for overall program.
- 17 Update & refine overall Total Project Budget (TPC) including hard and soft costs. (i.e., construction, design, management, testing, furnishings, equipment, permitting, connection fees, contingency funds, etc.)

Continued Next Page

**Exhibit "C" - Program Management Services
South Texas College - Scope of Services Detail**

Schematic Design Phase

- 1 Conduct Partnering (*Best Practice*) and kickoff meeting with Owner, Designer & others.
- 2 Communicate all pre-project planning information to Designer.
- 3 Conduct design meetings between Owner and Designer, document and resolve issues.
- 4 Prepare Schematic Design cost estimate, conduct reviews of Designer's cost estimate, reconcile, and take action to keep cost under control.
- 5 Review Schematic design documents and identify opportunities for cost savings and provide recommendations for review and approval by Owner
- 6 Review schedule and conduct schedule optimization session(s). (*Best Practice*)
- 7 Participate in drawing reviews for completeness, constructability, and cost savings. Coordinate, review, and evaluate all Schematic Design documents submitted by Designers and consultant engineers for compliance with Owner's design guidelines, space program needs and performance specifications per campus.
- 8 Conduct PDRI analysis. (*Best Practice*)
- 9 Provide a formal Constructability Program, complete with documented cost savings and value-added impacts. (*Best Practice*)
- 10 Initiate planning for Commissioning & Start-up. Begin this process early to define requirements, costs and achieve aggressive schedules. (*Best Practice*)

Design Development Phase

- 1 Oversee Preparation of Design Development Documents addressing architectural, structural, mechanical & electrical systems, materials and other appropriate elements.
- 2 Conduct regular meetings between Owner & Designer to review and evaluate design documents for compliance with guidelines.
- 3 Conduct review of schedule. Conduct schedule optimization session(s). (*Best Practice*)
- 4 Provide preliminary design review for code compliance.
- 5 Prepare Design Development cost estimate, conduct reviews of Designer's cost estimate, reconcile, and take action to keep cost under control.
- 6 Review design development documents and identify opportunities for cost savings and provide recommendations for review and approval by Owner
- 7 Participate in drawing reviews for completeness, constructability, and cost savings. Coordinate, review, and evaluate all Design Development documents submitted by Designer and its consultants for compliance with Owner's design guidelines, detailed program needs and performance specifications.
- 8 Conduct PDRI analysis. (*Best Practice*)
- 9 Continue formal Constructability Program. (*Best Practice*)
- 10 Begin planning for Commissioning & Start-up. (*Best Practice*)

Construction Documents Phase

- 1 Oversee preparation of Construction Documents addressing all project elements.
- 2 Conduct design review meetings and project management meetings with Owner representatives to update on compliance, progress, financial status, construction issues and use of project contingencies.
- 3 Coordinate with regulatory government entities for any building or statutory reviews and other approvals.
- 4 Participate in drawing reviews for completeness, constructability, and cost savings. Coordinate, review, and evaluate all Construction Documents submitted by Designers and subconsultants for compliance with owner's design guidelines, detailed program needs and performance specifications before procurement of sub-contractors. (Recommend 30%, 50%, 95% and 100% complete submissions.)
- 5 Review construction documents and identify opportunities for cost savings and provide recommendations for review and approval by Owner
- 6 Prepare Construction Documents cost estimate(s), reconcile, and take action to keep cost under control.
- 7 Update detailed project schedule, including major construction elements, and conduct schedule optimization session(s). (*Best Practice*)
- 8 If CM-at-Risk project delivery method, receive Guaranteed Maximum Price (GMP) proposal, evaluate, negotiate, & recommend acceptance.

Continued Next Page

**Exhibit "C" - Program Management Services
South Texas College - Scope of Services Detail**

Construction Documents Phase (Continued)

- 9 | Continue Formal Constructability Program. *(Best Practice)*
- 10 | Implement a Change Management System to control scope creep. *(Best Practice)*
- 11 | Plan for Commissioning & Start-up. *(Best Practice)*

Construction Phase

- 1 | Serve as the Owner's Point of Contact during construction. Conduct construction update meetings at construction sites on a weekly and as-needed basis.
- 2 | Conduct Partnering sessions at beginning of the construction phase to include all subcontractors. *(Best Practice)*
- 3 | Review required documents/outlines from Contractor including Quality Control Plan, Safety Plan, Environmental Compliance Plan, and Texas Architectural Barriers Plan (TAS/TDLR) and report to Contractor and Owner.
- 4 | Review and participate in Construction Manager's solicitation of bids and buyout of subcontract packages; ensure scope analysis is complete and track budget/contingency adjustments.
- 5 | Evaluate requests for proposed Change Orders and Construction Change Proposals and make recommendations.
- 6 | Conduct site visits and inspections to review work in place and report in a standard format to Owner with reference to facilities standards/specifications, schedules and budgets. Monitor construction progress and advise Owner of any observations of non-conforming scope or quality workmanship.
- 7 | Administer Construction Contract and General Conditions and serve as Owner's representative.
- 8 | Review compliance with all plans, specifications and required terms, and conditions and report to Owner on status. Take action as necessary to correct areas not in compliance.
- 9 | Assist Owner in contracting with Independent Testing Firms and review testing program results. (Tests typically include geotechnical, concrete, welding, compaction, etc.)
- 10 | Provide Field and Quality Assurance Oversight.
- 11 | Provide on-sight construction inspection services.
- 12 | Review approved submittals. Obtain Owner approvals needed.
- 13 | Managing the overall information flow during construction including submittals, RFI's, daily reports, photos, & meeting minutes through the Broaddus & Associates *Owner In-Site* ® Web-based Project Management System.
- 14 | Continue the Change Management System into construction phase. *(Best Practice)* Analyze each potential change, estimate cost and schedule, assess its impact, and negotiate the change amount. Execute necessary contract modification documents.
- 15 | If a CM-at-Risk project, track the GMP savings balance and plan for its use or recapture.
- 16 | Monitor Requests For Information (RFI's) and Designer responsiveness.
- 17 | Coordinate vendors under separate contract to owner, such as security, data, telecom, move management.
- 18 | Review Contractor's Building Commissioning and Turnover Plan as a part of Planning for Start-up. *(Best Practice)*
- 19 | Evaluate payment applications and make recommendations to owner on approval of requests for progress payments.
- 20 | Perform final inspections and review punch list work.

Occupancy & Commissioning (Turnover)

- 1 | Plan for furnishing procurement, installation and building turnover.
- 2 | Review the results of the HVAC Test and Balance for compliance with construction contract requirements.
- 3 | Monitor all pre-functional testing and check-out for compliance with commissioning plan.
- 4 | Oversee turnover of all certification documentation and submittals to proper agencies on behalf of Owner.
- 5 | Coordinating training of facility maintenance staff for familiarization with all systems.

Warranty and Occupancy

- 1 | Review all contractual and warranty obligations for compliance including the issuance of all documents such as operations and maintenance manuals.
- 2 | Generate and deliver tickler file of all warranty deadlines for each project.
- 3 | Coordinate reviews of warranty items after a 30 day and 6 month period.
- 4 | Provide post-occupancy evaluation of facility prior to warranty expiration.

Exhibit "D" - Hourly Rates

Broaddus & Associates

Labor Category	2014 Rate
Program Executive	\$ 255
Program Manager	\$ 225
Project Executive/Director/Area Manager	\$ 225
Senior Project Manager	\$ 191
Project Manager	\$ 157
Assistant Project Manager	\$ 139
Senior Construction Representative	\$ 122
Construction Representative	\$ 99
Planning Executive	\$ 220
Planning Director/Master Planner	\$ 196
Senior Planner/Programmer	\$ 174
Project Planner	\$ 115
Senior Cost Estimator	\$ 157
Cost Estimator / Scheduler	\$ 127
Architectural/Graphic Support	\$ 95
CAD/Graphics	\$ 76
Senior BIM Manager	\$ 155
BIM Manager	\$ 105
BIM Data Technician	\$ 75
Office Engineer/Administrative	\$ 64

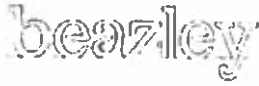


EXHIBIT "E"

DECLARATIONS

AFB A&E MEDIA TECH®

ARCHITECTS AND ENGINEERS PROFESSIONAL LIABILITY, ARCHITECTS, ENGINEERS AND CONTRACTORS POLLUTION LIABILITY, TECHNOLOGY BASED SERVICES, TECHNOLOGY PRODUCTS, COMPUTER NETWORK SECURITY, MULTIMEDIA AND ADVERTISING LIABILITY AND PRIVACY LIABILITY INSURANCE

THIS IS A CLAIMS MADE AND REPORTED POLICY. SUBJECT TO ITS TERMS, THIS POLICY APPLIES ONLY TO ANY CLAIM FIRST MADE AGAINST THE INSUREDS DURING THE POLICY PERIOD OR OPTIONAL EXTENSION PERIOD, IF APPLICABLE, AND REPORTED IN WRITING TO THE UNDERWRITERS EITHER DURING THE POLICY PERIOD, WITHIN SIXTY (60) DAYS AFTER THE EXPIRATION OF THE POLICY PERIOD OR DURING THE OPTIONAL EXTENSION PERIOD, IF APPLICABLE. AMOUNTS INCURRED AS CLAIMS EXPENSES SHALL REDUCE AND MAY EXHAUST THE LIMIT OF LIABILITY AND ARE SUBJECT TO THE DEDUCTIBLE. THE UNDERWRITERS SHALL NOT BE LIABLE FOR ANY DEFENSE COSTS OR FOR ANY JUDGMENT OR SETTLEMENT AFTER THE LIMIT OF LIABILITY HAS BEEN EXHAUSTED. PLEASE READ THIS POLICY CAREFULLY.

These Declarations along with the completed and signed Application and the Policy with endorsements shall constitute the contract between the Insureds and the Underwriters.

Underwriters: Beazley Insurance Company, Inc.

Policy Number: V1535E140101

Item 1. Named Insured: Broaddus & Associates

Address: 1301 South Capital of Texas Highway, Suite A-302
Austin, TX 78746

Item 2. Policy Period:

From: 27-Mar-2014

To: 27-Mar-2015

Both dates at 12:01 a.m. Local Time at the Address stated in Item 1.

Item 3. Limit of Liability:

(a) \$1,000,000 Each Claim – includes Claims Expenses

(b) \$1,000,000 Aggregate for the Policy Period – includes Claims Expenses

F00122
082009 ed.

Page 1 of 3

Item 4. **Deductible:** \$50,000 Each Claim Deductible – includes Claims Expenses

Item 5. **Premium:** \$74,904

Item 6. **Retroactive Date:** Full Prior Acts

Item 7. **Technology Based Services, Technology Products, Computer Network Security, and Multimedia and Advertising Liability Insurance Coverage Option:**

Purchased if this box is checked then Insuring Clauses I.C., I.D., I.E., I.F., and I.G. of this Policy shall apply.

Not Purchased if this box is checked then Insuring Clauses I.C., I.D., I.E., I.F. and I.G. of this Policy shall not apply.

If no box is checked, then Insuring Clauses I.C., I.D., I.E., I.F. and I.G. of this Policy shall not apply.

Item 8. **Optional Extension Period:**

(a) **Premium for Optional Extension Period:** 100% of the total premium as for this Policy

(b) **Length of Optional Extension Period:** 12 Months

Item 9. **Notification under this Policy:**

(a) Notification pursuant to Clause XI. shall be given to:

Email a&eclaims@beazley.com

Fax (866) 910-1397

Online http://www.beazley.com/claims_service/ae_claims_form.aspx

Mail Beazley Insurance Company, Inc.

30 Batterson Park Drive

Farmington, CT 06032

Attn: A&E Claims

If you have any questions or for additional information please call (888) 222-1123

(b) All other notices under this Policy shall be given to:

Beazley Insurance Company, Inc.
30 Batterson Park Road
Farmington, CT 06032
Tel: (860) 677-3700
Fax: (860) 679-0247

Item 10. Endorsements Effective at Inception:

- | | |
|------------------------|--|
| 1. BICMU00030507TX | Important Notice |
| 2. A0004 112007 ed. | Notification Of The Availability of Loss Control Information/Services- Texas |
| 3. BICMU05090406 | Nuclear Exclusion |
| 4. E02804 032011 ed. | Sanction Limitation and Exclusion Clause |
| 5. A00438TX 082009 ed. | Texas Amendatory Endorsement |
| 6. BICMU05070406 | War and Civil War Exclusion |
| 7. E01412 082009 ed. | First Dollar Defense Endorsement |
| 8. BICMU05020708TX | Reliance on Another Insurance Company's Application- Texas |
| 9. E05106 102013 ed. | Amend Insured to Include Scheduled Entity |
| 10. BICAE00351105 | Exclude Scheduled Entity/Person |
| 11. E04498 022013 ed. | Notice of Cancellation to Certificate Holder |
| 12. E01636 082010 ed. | Specific Project/Client Excess Limit of Liability Endorsement |

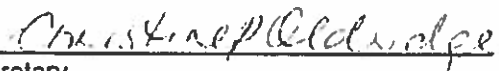
The Underwriters have caused this Policy to be signed and attested by its authorized officers, but it shall not be valid unless also signed by another duly authorized representative of the Underwriters.



Authorized Representative

01-Apr-2014

Date



Secretary



President

4.
Request for
Qualifications for
Architectural Services
for 2013 Bond
Construction Program



**STATEMENT OF QUALIFICATIONS
FOR
ARCHITECTURAL SERVICES**

2013 Bond Construction Program

**RFQ No. 14-15-1013
Request for Statement of Qualifications
For Architectural Services**

**South Texas College
Statement of Qualifications for
Architectural Services**

SECTION 1 – PROGRAM SUMMARY

- 1.1 **PROJECT DESCRIPTION AND SCOPE:** It is the intent of South Texas College to select multiple Architectural firms to provide Professional Services for design and construction administration for various projects included in the 2013 Bond Construction Program. Because of the number and specialized use of the buildings included in this construction program, firms with design experience directly related to each specialized use are encouraged to present such information as part of their statement of qualifications. STC’s buildings requiring specialized design include Science Technology Engineering and Math, Nursing and Allied Health, Law Enforcement, Library, Industrial Technology, Cafeteria and General Classrooms equipped with the latest instructional technology. Exhibit “A” attached describes the construction projects with associated square footage and cost included in this Bond Construction Program.
- 1.2 **PROJECT BUDGET:** In November 2013, voters approved funds in the amount of \$159,028,940 for South Texas College’s 2013 Bond Construction Program. Individual project funds have been allocated to each of the construction projects included in the program. It is the Architect’s responsibility to make sure that the project design and scope will be achieved within the allocated Construction Cost Limitation for each project assigned.
- 1.3 **PROJECT PLANNING SCHEDULE:** Key project planning schedules milestones will be established by South Texas College and the Bond Construction Program Management Consultant. Anticipated Phase I program milestones are listed below:
- | | |
|---|----------------|
| • Evaluation of qualifications | August 2014 |
| • STC Board approval of firms | September 2014 |
| • Contract negotiations and notice to proceed | October 2014 |
| • 60% construction documents (varies with project size) | May 2015 |
| • Construction proposals and negotiations | June 2015 |
| • Substantial Completion for construction | June 2016 |
- 1.4 **FACILITIES PROGRAM:** South Texas College, through its Bond Construction Program Management Consultant, will provide an outline Facilities Space Program for each building project. Each current Facility Space Program is included in Exhibit B attached and a final version will be transmitted to the successful Respondent(s) before start of Schematic Design for each project.
- 1.5 **BUILDING INFORMATION MODELING:** STC intends to implement the use of Building Information Modeling (BIM) in the bond program. STC’s program management consultant shall facilitate this process and shall coordinate with the STC’s assigned project stakeholders inclusive of the Architects, Engineers, Contractors, and

Commissioning Agents. STC has a successful facilities management system and process that it will expand with this bond program. Thus, alternate strategies are being developed with the STC's intent being the ability to transition to operations in a more streamlined manner in terms of facilities management information handover. The use of 3D models may be a consideration for operational use. However, the use of relevant information (structured data) associated with spaces, equipment, and documents are considered essential for the transition to operations. STC intends to cooperatively and collaboratively develop the balance of a BIM Execution Plan and associated Program of Requirements (BIM POR). The intent of STC and the program management consultant in this effort is to preclude the restructuring and reformatting of data and associated documents for operational turnover.

SECTION 2 – GENERAL REQUIREMENTS

2.1 **GENERAL:** South Texas College (“STC”) is soliciting statements of qualifications (“Qualifications”) from architectural firms (“Respondents”) for selection of architect(s) for Professional Services in accordance with the terms, conditions, and requirements set forth in this Request for Qualifications. This Request for Qualifications (“RFQ”) provides Respondents with the information necessary to prepare and submit Qualifications for consideration by STC.

2.2 **INQUIRIES AND INTERPRETATIONS:** Responses to inquiries which directly affect an interpretation or change to this RFQ will be issued in writing by STC as an addendum and sent to all parties recorded by the STC as having received a copy of the RFQ. All such addenda issued by STC prior to the time that proposals are received shall be considered part of the RFQ, and the Respondent shall be required to consider and acknowledge receipt of each addendum in its Qualifications.

Only those inquiries STC replies to by addenda shall be binding. Oral and other interpretations or clarifications will be without legal effect.

2.3 **QUALIFICATIONS SUBMITTAL DEADLINE:** STC will accept Qualifications until **2:00 p.m. (local time), Friday August 22, 2014.** Qualifications shall be submitted to the following address:

South Texas College
Purchasing Department
3200 W Pecan Blvd Bldg N-145
McAllen, Texas 78501

2.4 **SUBMISSION OF QUALIFICATIONS:**

2.4.1 Submit ten (10) identical copies of the Qualifications, including any supplemental printed material referenced within the Qualifications. An original signature must appear on the “Statement of Interest” and “Execution of Offer” documents of all submitted copies. The Qualifications must be received on or before the time and date specified above.

- 2.4.2 Late Qualifications properly identified will be returned to the Respondent unopened.
- 2.4.3 STC will not accept Qualifications that are delivered by telephone, facsimile (fax), or electronic mail (e-mail).
- 2.4.4 Submittals properly received will become property of STC and WILL NOT be returned to Respondents.
- 2.5 **POINT-OF-CONTACT:** STC requires that Respondents restrict all contact and questions regarding this RFQ to the individuals named below. Questions concerning terms and conditions and technical specifications shall be directed in writing to:

Gerry Rodriguez, AIA
Director of Facilities Planning and Construction
South Texas College
3200 W Pecan Blvd Bldg N-179
McAllen, Texas 78501
Phone: (956) 872-3737
Fax: (956) 872-3747
e-mail: gerry@southtexascollege.edu

or

Diana Bravo Gonzalez, AIA
Senior Project Manager
Broaddus & Associates
1100 E Jasmine Ave Ste 102
McAllen, Texas 78501
Phone: (956) 688-2307
Fax: (956) 688-2315
e-mail: dgonzalez@broaddusassociates.com

- 2.6 **QUALIFICATION BASED SELECTION PROCESS:** This solicitation is a request for professional services in accordance with Chapter 2254 of the Texas Government Code, Title 10, Subchapter A. Professional Services. Selection of the most highly qualified Respondent will be made on the basis of demonstrated competence and qualifications as determined by STC based upon the Qualifications submitted in response to this RFQ.
- 2.7 **EVALUATION OF QUALIFICATIONS:** STC representatives will evaluate and score Qualifications submitted. The evaluation of Qualifications is based on requirements described in SECTION 3 which also indicates the highest possible score for each requirement. STC may, at its option, invite one or more of the most highly qualified Respondents to attend a formal interview in McAllen, Texas, before final selection. The interview(s) will allow the invited Respondents to further discuss and clarify their qualifications with STC, and to respond to questions from STC representatives.

- 2.8 **CONTRACT AWARD PROCESS:** STC reserves the right to award a contract(s) for all or any portion of the requirements proposed by reason of this request, award multiple contracts, or to reject any and all Statement of Qualifications if deemed to be in the best interests of STC and to re-solicit for Statement of Qualifications, and to temporarily or permanently abandon the procurement. If STC awards a contract(s), it will award the contract(s) to the respondents whose Statement of Qualifications is the most advantageous to STC and is determined to be best qualified respondent(s).
- 2.9 **PRE-QUALIFICATIONS CONFERENCE:** A pre-qualifications conference will be held on **Thursday, August 14, 2014 at 2:00 p.m.** local time at following location:

South Texas College
Pecan Campus
3201 W. Pecan Blvd
Cooper Center for Performing Arts-South Conference Room
McAllen, Texas

SECTION 3 – REQUIREMENTS FOR STATEMENT OF QUALIFICATIONS

3.1 PART ONE: STATEMENT OF INTEREST (up to 100 points)

- 3.1.1 Provide a statement of interest for the project(s) as it relates to STC’s Bond Construction Program.
- 3.1.2 From the construction projects listed in Exhibit “A”, provide a list in order of preference for all projects your firm is most interested in and most qualified to perform architectural design services.
- 3.1.3 Provide a history including credentials about the prime firm.
- 3.1.4 Provide a narrative describing the design team’s unique qualifications and specialized design experience as it relates to the types of buildings listed in Exhibit “A”.
- 3.1.5 Provide a statement about the availability and commitment of the prime firm, its principals, its consultants and key professionals to undertake proposed projects.

3.2 PART TWO: PRIME FIRM (up to 100 points)

- 3.2.1 Provide resumes giving the experience and expertise of the principals and key professional members for the *prime firm* that will be involved in the project(s), including their experience with similar projects and the number of years with the prime firm.
- 3.2.2 Describe the proposed project assignments and lines of authority and communication for principals and key professional members of the *prime firm* that will be involved in the project(s). Indicate the estimated percent of their time these individuals will commit to the project(s) in order to meet the scheduled milestones.
- 3.2.3 Describe the *prime firm*’s proximity to South Texas College and its ability to respond to planned and/or unexpected meetings with STC representatives during the planning, design and construction phases of the project(s).
- 3.2.4 If applicable, describe the *prime firm*’s experience with the use of Building Information Modeling (BIM) in the planning (programming), design, construction, and commissioning process. Describe past experience with the collection of structured data and documents for use in operational turnover to STC.
- 3.2.5 If applicable, describe any litigation the *prime firm* is currently involved in which could affect the firm’s ability to provide professional services as required for STC’s construction program.

3.3 PART THREE: PROJECT TEAM (up to 100 points)

- 3.3.1 Provide an organizational chart showing the roles of *the prime firm and each basic services consultant* firm(s) or individual(s) to be included.

For each **basic services consultant** firm or individual that the prime firm proposes:

- Identify the basic services consultant and provide a brief history about the consultant
- Describe the basic services consultant's proposed role in the project
- List a project(s) that the prime firm and the basic services consultant have worked together on during the last five (5) years
- Provide a statement of the basic services consultant's availability for the project(s)
- Provide resumes giving the experience and expertise of principals and key professional members for the basic services consultant who will be assigned to the project(s).

3.3.2 Provide an organizational chart showing the roles of the **prime firm and each specialized consultant** firm(s) or individual(s) to be included if any.

For each **specialized consultant firm** or individual that the prime firm proposes:

- Identify the consultant and provide a brief history about the consultant and their area of design expertise
- Describe the consultant's proposed role in the project
- List three (3) projects the consultant has worked on during the last five (5) years which best describe the firm's design expertise
- List a project(s) that the prime firm and the specialized consultant have worked together on during the last five (5) years
- Provide a statement of the consultant's availability for the project(s)
- Provide resumes giving the experience and expertise of principals and key professional members for the consultant who will be assigned to the project(s).

3.3.3 Describe the project team's experience with the use of Building Information Modeling (BIM) in the planning (programming), design, construction, and commissioning process. Describe past experience with the collection of structured data and documents for use in operational turnover to STC.

3.4 PART FOUR: REPRESENTATIVE PROJECTS (up to 100 points)

3.4.1 List a maximum of five (5) projects the prime firm provided or is providing professional services which involve new construction or major expansion work in an educational setting. Provide the following information for each project listed:

- Project name and location
- Project Owner and contact information
- Project construction cost
- Project size in gross square feet
- Date project was started and completed
- Description of professional services prime firm provided for the project
- Project manager (individual responsible for coordinating the day to day work)
- Project architect (individual responsible for the overall success of the project)
- Project designer (individual responsible for design concepts)
- Names of consultant firms and their areas of expertise
- Description of what BIM processes and deliverables were provided

3.5 PART FIVE: REFERENCES (up to 100 points)

3.5.1 Provide references for five (5) projects, other than STC, listed in response to Part Four, 3.4.1. The references shall include the following current information:

- Owner's name, Owner's representative who served as the day-to-day liaison during planning, design, and construction of the project, and the Owner representative's telephone number.

3.6 PART SIX: PROJECT EXECUTION (up to 100 points)

3.6.1 Provide information as part of submission response to assure that Architectural firm is willing and able to expedite design services and construction administration for the STC's 2013 Bond Construction Program. Please provide insight if Architect is intending to supplement production capability in order to meet schedule demands.

SECTION 4 – FORMAT FOR STATEMENT OF QUALIFICATIONS

4.1 PAGE SIZE, BINDING, DIVIDERS, AND TABS:

- 4.1.1 Submittals should be printed on letter-size (8-1/2” x 11”) paper and assembled with spiral-type bindings or staples. STC prefers that metal-ring hard cover binders NOT be used.
- 4.1.2 Preprinted material should be referenced in the submittal and included as labeled attachments.
- 4.1.3 Separate each part of the Qualifications by use of a divider sheet with an integral tab for ready reference. Identify the tabs in accordance with the parts under Section 3 - Requirements for Statement of Qualifications.

4.2. TABLE OF CONTENTS:

- 4.2.1 Include a Table of Contents for the Qualifications and give page numbers for each part of the Qualifications as well as any separate attachments. Supplementary information not required by Section 3 – Requirements For Statement Of Qualifications should be clearly identified in the Table of Contents and provided as a separate part.

4.3 PAGINATION:

- 4.3.1 Qualifications shall be a maximum of seventy (70) pages single sided or thirty-five (35) double sided. The covers, table of contents, and divider sheets do not count as pages.

SECTION 5 – INSURANCE REQUIREMENTS

- 5.1 Any firm awarded a contract as a result of this solicitation will be required to carry insurance in the types and limits listed below.

Workers’ Compensation	Statutory Limit	
Employers’ Liability	\$100,000	Each Accident
	\$100,000	Disease - Each Employee
	\$500,000	Disease - Policy Limit
Commercial General Liability	\$2 million	General Aggregate
	\$1 million	Each Occurrence
	\$1 million	Products and Completed Operations
	\$1 million	Personal and Advertising Injury
	\$100,000	Fire Damage
	\$5,000	Medical Payments

Automobile Liability	\$1 million	Each occurrence
Professional Liability	\$1 million	General Aggregate
	\$1 million	Each Occurrence

These insurance limits may be increased at the negotiation phase if STC deems necessary.

All insurance companies providing the required insurance shall be authorized to transact business in Texas and rated at least "A" by AM Best or other equivalent rating service.

DRAFT

ADDENDA CHECKLIST

Any addenda issued by STC to this RFQ will become part of the RFQ. Addenda will be numbered sequentially. Respondent must indicate on this sheet the receipt of any and all addenda.

Receipt is hereby acknowledged of the following addenda to this RFQ.

No. 1 _____

No. 2 _____

No. 3 _____

No. 4 _____

Company/Entity Name: _____

Authorized Signature

EXECUTION OF OFFER

THIS EXECUTION OF OFFER MUST BE COMPLETED, SIGNED, AND RETURNED WITH THE RESPONDENT'S STATEMENT OF QUALIFICATIONS. FAILURE TO COMPLETE, SIGN AND RETURN THIS EXECUTION OF OFFER MAY RESULT IN REJECTION OF THE STATEMENT OF QUALIFICATIONS.

In compliance with this solicitation, and subject to all the conditions herein, the undersigned offers and agrees to furnish the products and/or services described in its Statement of Qualifications. Failure to sign the offer, or signing it with a false statement, shall void the submitted offer or any resulting contract, and the Respondent may be removed from STC vendor lists.

By signature hereon, the Respondent acknowledges and agrees that 1) this is a solicitation for qualifications and is not a contract or an offer to contract; 2) the submission of a statement of qualifications by Respondent in response to this solicitation will not create a contract between respondent STC and Respondent; and 3) STC has made no representation or warranty, written or oral, that one or more contracts with STC will be awarded under this solicitation.

By signature hereon, the Respondent hereby certifies that it has the necessary experience, knowledge, abilities, skills, and resources to provide the products and/or perform the services requested herein.

By signature hereon, the Respondent hereby certifies that it is not currently delinquent in the payment of any franchise taxes owed the State of Texas under Chapter 171, Tax Code, if applicable.

By signature hereon, the Respondent hereby certifies that it is not debarred, suspended or otherwise declared ineligible for 1) participation in federal programs (pursuant to 24 CFR 84.13), or 2) doing business with the State of Texas.

By executing this offer, Respondent affirms that he/she has not given, offered to give, nor intends to give at any time hereafter, any economic opportunity, future employment, gift, loan, gratuity, special discount, trip, favor, or service to a public servant in connection with the submitted offer.

By the signature hereon, the Respondent hereby certifies that neither the Respondent nor the firm, corporation, partnership, or institution represented by the Respondent or anyone acting for such firm, corporation, or institution has violated the antitrust laws of the State of Texas, codified in Section 15.01, et seq., Texas Business and Commerce Code, or the Federal antitrust laws, nor communicated directly or indirectly the offer made to any competitor or any other person engaged in such line of business.

By signature hereon, Respondent certifies that the individual signing this document and the documents made part of this solicitation is authorized to sign such documents on behalf of the company and to bind the company under any contract which may result from the submission of this proposal.

By signature hereon, Respondent affirms that he has not prepared, or assisted in the preparation of, the specifications or other requirements for this solicitation.

By signature hereon, Respondent signifies his compliance with all federal laws and regulations pertaining to Equal Employment Opportunities and Affirmative Action.

By signature hereon, Respondent signifies his compliance with requirements of the Drug-Free Workplace Act of 1988.

By signature hereon, Respondent represents and warrants that it is a reputable company regularly engaged in providing the products and/or services necessary to meet the terms, conditions and requirements of this solicitation.

Proposal must include Taxpayer Identification Number, full firm name and address of Respondent. Failure to manually sign proposal will disqualify it. The person signing the proposal should show title or authority to bind his/her firm in contract.

Taxpayer Identification Number: _____

Respondent/Company: _____

Signature: _____

Name (Typed/Printed): _____

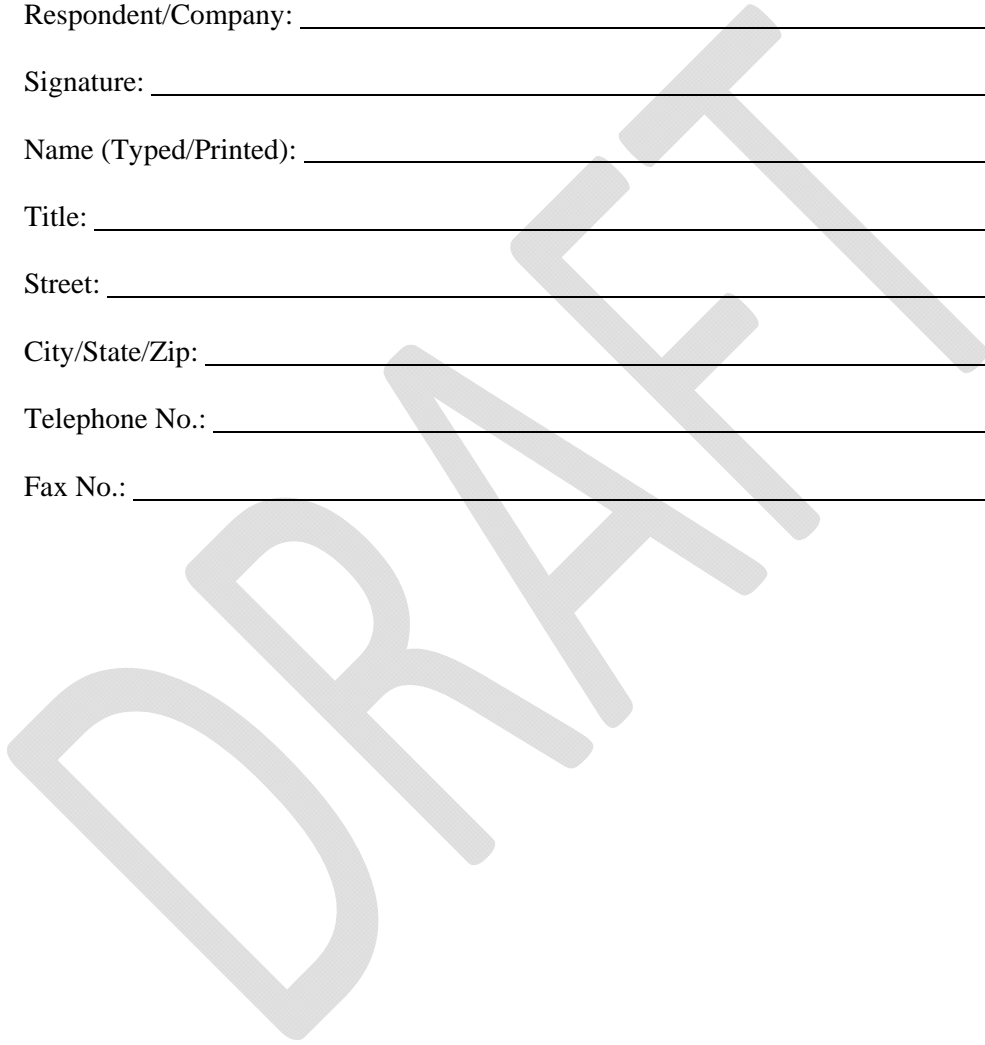
Title: _____

Street: _____

City/State/Zip: _____

Telephone No.: _____

Fax No.: _____



NOTIFICATION OF CRIMINAL HISTORY

TO BE SUBMITTED WITH BID/PROPOSAL/QUOTE

State of Texas legislative Bill No. 1 Section 4.034, Notification of Criminal History, Subsection (a) states “ a person or business entity that enters into a contract with a school district must give advance notice to the district if the person or an owner or operator of the business entity has been convicted of a felony. The notice must include a general description of the conduct resulting in the conviction of a felony.”

Subsection (b) states “a school district may terminate a contract with a person or business entity if the district determines that the person or business entity failed to give notice as required by Subsection (a) or misrepresented the conduct resulting in the conviction. The district must compensate the person or business entity for services performed before the termination of the contract.”

THIS NOTICE IS NOT REQUIRED OF A PUBLICLY-HELD CORPORATION

Please check off one box and sign the form in the appropriate space

I, the undersigned agent for the firm named below, certify; that the information concerning notification of felony convictions has been reviewed by me and the information furnished is true to the best of my knowledge.

VENDOR’S NAME:

AUTHORIZED COMPANY OFFICIAL’S NAME (PRINTED): _____

My firm is a publicly held corporation; therefore, this reporting requirement is not applicable.
SIGNATURE OF COMPANY OFFICIAL _____

My firm is not owned nor operated by anyone who has been convicted of a felony.
SIGNATURE OF COMPANY OFFICIAL _____

My firm is owned and/or operated by the following individual(s) who has/have been convicted of a felony:
Name of Felon(s) _____

Details of Conviction(s) _____

SIGNATURE OF COMPANY OFFICIAL _____

CONFLICT OF INTEREST QUESTIONNAIRE
For vendor or other person doing business with local governmental entity

FORM CIQ

This questionnaire reflects changes made to the law by H.B. 1491, 80th Leg., Regular Session.

This questionnaire is being filed in accordance with Chapter 176, Local Government Code by a person who has a business relationship as defined by Section 176.001(1-a) with a local governmental entity and the person meets requirements under Section 176.006(a).

By law this questionnaire must be filed with the records administrator of the local governmental entity not later than the 7th business day after the date the person becomes aware of facts that require the statement to be filed. See Section 176.006, Local Government Code.

A person commits an offense if the person knowingly violates Section 176.006, Local Government Code. An offense under this section is a Class C misdemeanor.

OFFICE USE ONLY

Date Received

1 Name of person who has a business relationship with local governmental entity.

2 Check this box if you are filing an update to a previously filed questionnaire.

(The law requires that you file an updated completed questionnaire with the appropriate filing authority not later than the 7th business day after the date the originally filed questionnaire becomes incomplete or inaccurate.)

3 Name of local government officer with whom filer has employment or business relationship.

 Name of Officer

This section (item 3 including subparts A, B, C & D) must be completed for each officer with whom the filer has an employment or other business relationship as defined by Section 176.001(1-a), Local Government Code. Attach additional pages to this Form CIQ as necessary.

A. Is the local government officer named in this section receiving or likely to receive taxable income, other than investment income, from the filer of the questionnaire?

Yes No

B. Is the filer of the questionnaire receiving or likely to receive taxable income, other than investment income, from or at the direction of the local government officer named in this section AND the taxable income is not received from the local governmental entity?

Yes No

C. Is the filer of this questionnaire employed by a corporation or other business entity with respect to which the local government officer serves as an officer or director, or holds an ownership of 10 percent or more?

Yes No

D. Describe each employment or business relationship with the local government officer named in this section.

4

 Signature of person doing business with the governmental entity

 Date

Adopted 06/29/2007

South Texas College
Architectural Services
RFQ Evaluations
Project No. _____

Evaluator:

CRITERIA		Criteria Weight		
3.1 Statement of Interest		100		
3.1.1	Statement of interest on projects			
3.1.2	Top three projects preferred			
3.1.3	Firm History and Important Statistics			
3.1.4	Narrative describing firm's qualification and specialized design experience			
3.1.5	Availability and commitment of firm, consultants and key professionals			
3.2 Prime Firm		100		
3.2.1	Experience and expertise of key members, Including experience with similar projects			
3.2.2	Proposed project assignments, lines of authority, estimated time assignment of personnel			
3.2.3	Firm's proximity to college and ability to respond to meetings			
3.2.4	Firm's experience with Building Information Modeling			
3.2.5	Litigation prime firm is involved in			
3.3 Project Team		100		
3.3.1	Organizational chart showing, the roles of the prime firm and basic services consultants			
	Name Consultant and provide brief history			
	Consultant's proposed role in project			
	Projects Consultant and prime have worked together on in last 5 year			
	Statement of Consultant's availability for this project			
	Resumes showing experience and expertise of key individuals			
3.3.2	Organizational chart showing roles of prime firm and specialized consultants			
	Name Consultant and provide brief history			
	Consultant's proposed role in project			
	Three projects consultant has worked on during last 5 years			
	Statement of Consultant's availability for the projects			
	Resumes of principals and key members of consultant assigned to projects			
3.3.3	Project team's experience with use of Building Information Modeling			
3.4 Representative Projects		100		
3.4.1	Specific data on 5 representative projects showing similarities			
	Project name and location			
	Project Owner and contact information			
	Project construction cost			
	Project size in gross square feet			
	Date project was started and completed			
	Professional services prime firm provided for the project			
	Project manager			
	Project architect			
	Project designer			
	Names of consultant firms and their expertise.			
	Description of how project is similar to proposed project			
3.5 Five References		100		
3.5.1	Name Owner and Owner's Representative and phone numbers.			
3.6 Project Execution		100		
3.6.1	Expedite design and construction administration. Production capability to meet schedule demands			
TOTAL:		600		



Exhibit "A"
Proposed Projects Designations and Locations

Project Designation	Construction Project Description	Square Feet	Bldg Cost
	<i>Pecan Campus</i>		
A	Pecan Campus North Academic Building	61,267	\$10,500,000
	Pecan Campus STEM Building	48,879	\$8,500,000
B	Pecan Campus Student Activities Building and Cafeteria	33,042	\$5,700,000
	Pecan Campus South Academic Building	40,000	\$6,800,000
	Subtotal	183,188	\$31,500,000
	<i>Nursing & Allied Health Campus</i>		
C	Nursing and Allied Health Campus Expansion	87,222	\$16,600,000
	Subtotal	87,222	\$16,600,000
	<i>Technology Campus</i>		
D	Technology Campus Southwest Building Renovation	72,000	\$12,000,000
	Subtotal	72,000	\$12,000,000
	<i>Mid Valley Campus</i>		
E	Mid Valley Campus Health Professions and Science Building	76,069	\$13,500,000
	Mid Valley Campus Workforce Training Center Expansion	10,000	\$1,750,000
	Mid Valley Campus Library Expansion	10,369	\$1,750,000
	Mid Valley Campus Student Services Building Expansion	14,269	\$2,500,000
	Subtotal	110,707	\$19,500,000
	<i>Starr County Campus</i>		
F	Starr County Campus Health Professions and Science Building	48,690	\$8,500,000
	Starr County Campus Workforce Training Center Expansion	9,302	\$1,600,000
	Starr County Campus Library	16,516	\$2,800,000
	Starr County Campus Student Services Building Expansion	5,000	\$850,000
	Starr County Campus Student Activities Building Expansion	4,923	\$850,000
	Subtotal	84,431	\$14,600,000
	<i>Regional Center for Public Safety Excellence - Pharr</i>		
G	Regional Center for Public Safety Excellence	16,000	\$3,000,000
	Subtotal	16,000	\$3,000,000
	<i>STC La Joya Teaching Site (Jimmy Carter ECHS)</i>		
H	La Joya Jimmy Carter Teaching Site Training Labs Improvements	11,000	\$1,900,000
	Subtotal	11,000	\$1,900,000
	TOTAL	564,548	\$ 99,100,000

Note: Exhibit "A" shall be submitted as part of RFQ response.