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December 12, 2013

Ms. Melissa Bauer  
Procurement Officer  
State of Arizona  
State Procurement Office  
100 N. 15<sup>th</sup> Ave., Suite 201  
Phoenix, Arizona 85007

p 602.265.7900  
f 602.265.9477

*Submitted Electronically*

Annual Professional Services Contract  
ADEPO14-00003465

Dear Ms. Bauer:

FM Solutions, Inc. is pleased to submit our qualifications for your 2014 Request for Qualifications and Experience List.

FM Solutions was established eleven years ago, and has since become well known for the variety of services we provide for the lifecycle of a facility, to include Architecture & Design, Facility Consulting, Project Management and Field Services. In addition, FM Solutions has established themselves as a state-wide leader in Energy, Environmental and Sustainable Design. Our company President is the current State Chair for the US Green Building Council, and an IFMA Fellow. We have partnered to write the LEED-AP accreditation exam, authored the Building Operations Manual that is now a template for the LEED-required Building Commissioning Plan, and provide LEED education training for the Phoenix metro area. Many of our staff members are LEED-AP certified and we are continuing to help obtain LEED certification on our projects. FM Solutions strives daily to improve best practices to our design, project management and maintenance of all facilities.

Please do not hesitate to contact us with any questions or concerns you may have. You may contact me directly at 602-763-0050 or fax at 602-265-9477. My email address is [cslife@fmsolutions.net](mailto:cslife@fmsolutions.net).

Sincerely,  
FM Solutions, Inc.

A handwritten signature in black ink, appearing to read 'C. Slife'.

Curtis L. Slife, AIA, NCARB, CFM, IFMA Fellow  
President



# State of Arizona 2014 Annual Professional Services Contract ADSP0-00003465

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## *FM Solutions, Inc.*

4001 N. Third Street, Suite 250  
Phoenix, Arizona 85012  
602-265-7900 Office  
602-763-0050 Cell  
602-265-9477 Fax

Curtis Slife, AIA, NCARB, CFM  
President  
[cslife@fmsolutions.net](mailto:cslife@fmsolutions.net)

(If a firm has branch offices, complete for each specific branch office seeking work.)

1. **REVISED ADSP013-00003465: Annual Request for Qualifications**

a.	FIRM (OR BRANCH OFFICE) NAME:	<b>FM Solutions, Inc.</b>
b.	FIRM (OR BRANCH OFFICE) STREET:	<b>4001 North 3<sup>rd</sup> Street, Suite 250</b>
c.	FIRM (OR BRANCH OFFICE) CITY:	<b>Phoenix</b>
d.	FIRM (OR BRANCH OFFICE) STATE:	<b>Arizona</b>
e.	FIRM (OR BRANCH OFFICE) ZIP CODE:	<b>85012</b>
f.	YEAR ESTABLISHED:	<b>2002</b>

(g1).	OWNERSHIP - TYPE:	<b>Corporation</b>
(g2).	OWNERSHIP - SMALL BUSINESS STATUS:	<b>Small Business</b>

h.	POINT OF CONTACT NAME AND TITLE:	<b>Curtis Slife, President</b>
i.	POINT OF CONTACT TELEPHONE NUMBER:	<b>602-763-0050</b>
j.	POINT OF CONTACT E-MAIL ADDRESS:	<a href="mailto:vslife@fmsolutions.net">vslife@fmsolutions.net</a>

k.	NAME OF FIRM (If block 1a is a branch office):	
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**2. EMPLOYEES BY DISCIPLINE**

a. Discipline Title	b. Function: Primary (P) or Secondary (S)	c. No. of Employees - Firm	d. No. of Employees - Branch
Architect	<b>P</b>	<b>3</b>	
Industrial Engineer	<b>P</b>	<b>2</b>	
CADD Technician	<b>1P 2S</b>	<b>1</b>	
Construction Manager	<b>5P 2S</b>	<b>5</b>	
Cost Estimator/Estimator	<b>P 4S</b>	<b>2</b>	
Environmental Engineer	<b>1S</b>	<b>0</b>	
Specialist	<b>P 2S</b>	<b>2</b>	
Technician/Analyst	<b>P 2S</b>	<b>3</b>	
Other	<b>P</b>	<b>4</b>	
<b>Total</b>		<b>22</b>	

**3. PROFILE OF FIRM'S EXPERIENCE AND ANNUAL AVERAGE REVENUE FOR LAST YEAR**

a. Approximate No. of Projects	b. Experience	c. Revenue Index Number (see below)
<b>3</b>	<b>Mission Critical Design</b>	<b>3</b>
<b>4</b>	<b>Master Planning for Facilities and Grounds</b>	<b>3</b>
<b>10</b>	<b>Assessment of Facilities</b>	<b>3</b>
<b>110</b>	<b>Project Management Overall</b>	<b>4</b>
<b>700</b>	<b>Move Management Overall</b>	<b>3</b>
<b>8</b>	<b>Sustainable Design</b>	<b>2</b>
<b>30</b>	<b>Cost Estimating</b>	<b>1</b>
<b>10</b>	<b>Commissioning</b>	<b>3</b>
<b>20</b>	<b>Office Design</b>	<b>5</b>
<b>10</b>	<b>Healthcare Design</b>	<b>3</b>
<b>8</b>	<b>Industrial Design</b>	<b>3</b>
<b>6</b>	<b>Educational Facility Design</b>	<b>2</b>
<b>5</b>	<b>Vehicle Maintenance Repair Facilities</b>	<b>3</b>
<b>2</b>	<b>Computer Maintenance Management Systems (CMMS)</b>	<b>2</b>
<b>10</b>	<b>Computer Aided Facility Design (CAFM)</b>	<b>2</b>
<b>10</b>	<b>Roof Design</b>	<b>2</b>

PROFESSIONAL SERVICES REVENUE INDEX NUMBER

- |   |   |
|---|---|
| 1. Less than \$100,000                  | 6. \$2 million to less than \$5 million   |
| 2. \$100,000 to less than \$250,000     | 7. \$5 million to less than \$10 million  |
| 3. \$250,000 to less than \$500,000     | 8. \$10 million to less than \$25 million |
| 4. \$500,000 to less than \$1 million   | 9. \$25 million to less than \$50 million |
| 5. \$1 million to less than \$2 million | 10. \$50 million or greater               |

4. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT (Complete one Section 4 for each key person.)



**Curtis L. Slife, AIA, NCARB, CFM**

- A. ROLE IN THIS CONTRACT: **PRINCIPAL IN CHARGE**
- B. YEARS EXPERIENCE - TOTAL: **35**
- C. YEARS EXPERIENCE - WITH CURRENT FIRM: **11**
- D. FIRM NAME AND LOCATION (City and State): **FM Solutions, Inc. Phoenix, Arizona**
- E. EDUCATION (DEGREE AND SPECIALIZATION): **Kansas State University Bachelors of Architecture 1978**
- F. CURRENT PROFESSIONAL REGISTRATION (STATE AND DISCIPLINE): **Arizona Architect # 15252  
NCARB # 116058  
CFM # 59944**
- G. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.):  
**IFMA Fellow, Current AZ. State Chair of USGBC, IFMA/Utilities Council Past President, Regional AIA Award, Karl Abel Award, Sheila Sheridan Award for Sustainability, Lecturer/Sponsor/Instructor for FMP and CFM Training, (2) IFMA Council of Year Awards, State AIA Design Award, IFMA Achievement Award.**
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Curtis has 35 years of experience in architecture, interior design, facility management and project management. He is Co-Founder and President of FM Solutions. Curtis has designed and managed a wide array of project types ranging from new buildings to renovations and additions of existing facilities.

He has 16 years of experience as a facility manager responsible for design/build and on-going facility operations and maintenance programs. Curtis was instrumental in creating an award-winning IFMA Achievement Award facility plan for a Utility Company that had a 2 million square-foot portfolio of office buildings, data centers, commercial shops, labs and warehouses. His implementation of this plan resulted in increased efficiency/reliability and reduced overhead cost of \$20 million per year. He recently also received IFMA's coveted Sheila Sheridan Award for sustainability and energy efficient projects and was selected an IFMA Fellow in 2013. Recently he just finished leading up a team that provided a Facility Master Plan for a local Nuclear Plant.

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**H. RELEVANT PROJECTS**

**Banner Health Data Center Studies, Metro Phoenix Area, AZ:** Principal In Charge. Banner Health solicited assistance from FM Solutions to assess and assist in their development of a regional, corporate Data Center. Initially the existing primary data center was assessed and determined to be a poor selection for a primary data center. Recommendations were made to construct a new off-site data center, and once operational, make improvements to the existing primary data center to become a reliable secondary site.

**Cox Communications Secondary Telecommunications Centers, Sierra Vista, Pinal County, and Green Valley, AZ:** Principal In Charge. The STC sites were a Design/ Build delivery with True Performance Builders, Inc. FM Solutions worked with Cox Communications to develop a prototype design that not only accommodated the national requirements, but the local needs as well. The building has a compact layout to make the best use of the available space and allow for future expansion.

**Lockheed Martin Building 50 Data Center Renovations, Goodyear, AZ:** Principal In Charge. Managed the design and completion of the Contract Documents for a renovation and expansion of two existing Data Centers. A new central plant, emergency generators and UPS were all designed and constructed as a part of this project.

**Cox Communications CAB Server Farm, Phoenix, AZ:** Principal In Charge. Worked with Cox Communications Commercial Division to develop an existing leased building into a disaster recovery data center. The 30,000 SF leased spaced was modified to increase the raised floor area to approximately 4,500 SF, the limits of the existing electrical service, battery backup and standby generator. A Master Plan was developed for the build out of the entire suite, increasing both the raised floor and infrastructure support areas.

**APS DVN2 Data Center Modifications, Phoenix, AZ:** Principal In Charge. Completed Contract Documents to increase the existing data center floor area to provide primary and secondary Power Distribution Units (PDU's) and redundant CRAC cooling for a separate room adjacent to the existing data center. The space had an existing halon, clean agent system and raised floors.

4. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT (Complete one Section 4 for each key person.)



**Dale Benz, CFM, LEED AP O+M**

A. ROLE IN THIS CONTRACT: **DIRECTOR OF FACILITY CONSULTING/ACCOUNT MANAGER**

B. YEARS EXPERIENCE - TOTAL: **7**

C. YEARS EXPERIENCE - WITH CURRENT FIRM: **6**

D. FIRM NAME AND LOCATION (City and State): **FM Solutions, Inc. Phoenix, Arizona**

E. EDUCATION (DEGREE AND SPECIALIZATION): **BS Industrial Engineering, Arizona State Univ. 2006**

F. CURRENT PROFESSIONAL REGISTRATION (STATE AND DISCIPLINE): **LEED-AP, USGBC, 2008; FMP, IFMA, 2008; CFM, IFMA, 2012; OSHA 30, 2012**

G. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.): **Institute of Industrial Engineers, IFMA Member, Co-Founder of IFMA's Green Peer Group, USGBC Member Energy Star Portfolio Manager, Speaker @ GreenBuild 2010, Chicago, IL. "Energy Benchmarking for Manufacturing Facilities".**

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Dale is a Certified Facility Manager and is a LEED AP O+M. He has an Industrial Engineering background primarily focused on Industrial Management Systems. He has extensive project management experience which encompasses both facilities and software related projects. It was the combination of this dual expertise which recently sparked the creation of a proprietary facilities asset management web tool ([www.FacilitiesApps.com](http://www.FacilitiesApps.com)) which was scoped, managed and currently operated by Dale and his team. The tool allows Facility Managers to actively track work to be performed, quantify their buildings' condition into industry standard metrics, and adequately plan and budget for future projects to be completed. Dale also has significant experience managing other types of projects including comprehensive facility master plans, building condition evaluations, benchmarking studies and green certifications such as LEED and Energy Star labeling.

H. RELEVANT PROJECTS

**Camelback Esplanade Towers IV and V, Phoenix, AZ**  
**LEED EB O+M Certifications**

Dale is currently overseeing the LEED EB O+M V2009 certification for two multi-tenant office buildings in Phoenix, AZ. The project includes two office towers which total nearly half a million square feet. Energy related services included in the scope of work performed were ASHRAE Level 1 Energy Audits, Energy Star benchmarking and energy performance documentation, as well as Retro commissioning.

**Yavapai Apache Nation, Camp Verde, AZ**  
**ASHRAE Level 2 Energy Audits**

Dale managed ASHRAE Level 2 Energy Audits comprehensive facility condition assessments of the Yavapai Apache Nation Community Services Building and Administration Building in Camp Verde, AZ.

**City of Tempe, AZ**

**Facilities Condition Assessments & Maintenance Master Plan**

Project Manager of project team that conducted facility condition assessments as well as an asset management and maintenance analysis of 79 City owned facilities totaling 1.5 million square feet.

**Palo Verde Nuclear Generating Station, Arizona**  
**Facilities Condition Assessments & Master Plan**

Project Manager and member of assessment team which provided comprehensive condition assessments of over 800,000 square feet of facilities in the protected and non-protected areas within the PVNGS campus.

**Coconino County, Arizona**

**Facilities Condition Assessments & Master Plan**

Conducted facility assessments of over 60 buildings owned and/or maintained by the County (606,000 GSF, valued at well over \$100 million). Assessments include rating the condition of the buildings, rating mechanical systems within the building, as well as recording the functional activities that take place in the building. Facility Condition Indices were developed from this data which helped determine each facility's future in the County's Facilities Master Plan.

4. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT (Complete one Section 4 for each key person.)



**David P. Ramirez, CFM, LEED AP BD+C, CEAS 1**

- A. ROLE IN THIS CONTRACT: **PRINCIPAL PROJECT MANAGER**
- B. YEARS EXPERIENCE - TOTAL: **19**
- C. YEARS EXPERIENCE - WITH CURRENT FIRM: **11**
- D. FIRM NAME AND LOCATION (City and State): **FM Solutions, Inc. Phoenix, Arizona**
- E. EDUCATION (DEGREE AND SPECIALIZATION): **A.A.S. – AZ Tech College/General Studies College of DuPage**
- F. CURRENT PROFESSIONAL REGISTRATION (STATE AND DISCIPLINE): **CFM, LEED AP BD+C, CEAS 1**
- G. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.): **USBGC, IFMA, Presenter for Utility Council – “LEED Operating & Maintenance”, Director of Sojourner Center**

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David Ramirez, Co-Founder of FM Solutions, is a highly skilled and diverse certified facility manager offering 19 years of comprehensive professional experience in corporate and utility facility management, project management and construction. He is agile at managing employees and multiple projects while maintaining a high level of accuracy and quality. Clients recognize him as a goal oriented self-starter with a proven track record of personally managing projects and motivating and building exceptional teams who have delivered hundreds of successful projects.

David’s extensive experience includes the development and monitoring of long term forecasts, capital and operations and maintenance budgets, schedule development, managing tenant improvements and ground up construction, IT and Security coordination, LEED Certifications, Building Assessments, Master Planning and Employee Relocations. In addition to his years of construction and management experience, David has extensive knowledge of office furniture systems including Haworth, Knoll, Herman Miller and Steelcase.

H. RELEVANT PROJECTS

**APS Service Center Flagstaff, Flagstaff, AZ**

Managed the \$5.1 million complete ground up construction of a new 12,000 SF office building. Scope of work included, budget development, space planning, design coordination, bidding, construction administration, IT coordination, furniture installation and employee relocations.

**APS Service Center Wickenburg, Wickenburg, AZ**

Managed the \$4.5 million complete ground up construction of a new 7,000 SF combination office/warehouse building to include lay down yards. Scope of work included, budget development, space planning, design coordination, bidding, construction administration, IT coordination, furniture installation and employee relocations.

**APS DVN1 Inserter Project, Phoenix AZ**

Managed the \$3.5 Million 8,000 sf. conversion of office and storage area into new state of the art high speed printing/insertion facility. Scope of work included, budget development, space planning, design coordination, bidding, construction administration, IT coordination, environmental controlled equipment installation and employee relocations.

**Pinnacle West Federal Lobbyist Tenant Improvement, Washington DC**

Managed the tenant improvement and corporate relocation of Vice President of federal affairs. Scope of work included, budget development, design coordination, bidding, construction administration, IT coordination, furniture installation and employee relocation.

**Corio, Feasibility Study / Tenant Improvement, Phoenix, AZ\***

Provided facilities management services for the 25,000 SF tenant improvement project. The Phase 1 scope of work included analysis of 3 potential corporate office locations and their compatibility with Corio’s current architectural, mechanical, electrical and interior requirements. The Phase 2 scope of work included managing construction document development, construction, technology and furniture installation, and employee relocation.

4. RESUMES OF KEY PERSONNEL PROPOSED FOR THIS CONTRACT (Complete one Section 4 for each key person.)



**Bob Eardley, LEED AP, AIT**

- A. ROLE IN THIS CONTRACT: **LEAD DESIGNER**
- B. YEARS EXPERIENCE - TOTAL: **10**
- C. YEARS EXPERIENCE - WITH CURRENT FIRM: **3**
- D. FIRM NAME AND LOCATION (City and State): **FM Solutions, Inc.**
- E. EDUCATION (DEGREE AND SPECIALIZATION): **AS Architectural Technology, Salt Lake Community College**
- F. CURRENT PROFESSIONAL REGISTRATION (STATE AND DISCIPLINE): **AIT #520513, LEED AP**
- G. OTHER PROFESSIONAL QUALIFICATIONS (Publications, Organizations, Training, Awards, etc.):

**Adjunct Faculty Salt Lake Community College, USGBC Greenbuild Expo Speaker, AUGI CADcamp Speaker**

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**Bob has over 10 years of experience as a project manager and lead designer in the architecture environment. Bob has also worked for an Autodesk reseller providing expert support, employee/BIM Manager training, customization, implementation, and standardization services to Architecture, Engineering and Construction firms throughout Arizona, Utah, and New Mexico.**

**He has designed and managed a wide range of project types and sizes that include but are not limited to mission critical facility, corporate office, restaurant, government medical facility, residential, financial institution, and hospitality. His technical approach to architecture gives his clients the ability to explore the designs that best meet their business needs.**

**H. RELEVANT PROJECTS**

**APS Cholla Power Plant – Administration and Security Buildings - Joseph City, AZ**

Bob lead the design of a major remodel which included a complete remodel of two adjacent administration buildings totaling 30,000 SF, a new 800 SF security center, and new parking, road improvements and landscaping. This major renovation utilizes universal design which will make the space flexible for many different user groups. The design incorporated APS standards for room sizes, furniture and finishes. The project also included all new mechanical, plumbing and electrical systems

**Clear Channel Outdoor - Corporate Headquarters - Phoenix, AZ**

Design and rendering support for 30,000 SF corporate headquarters relocation and design of new facility. Incorporated all finishes and material information into BIM model. Created live 3D presentations to walk the client through their space during the design phase. Project included programming, leasing coordination, design, test fitting multiple locations, construction documents, construction administration, furniture, furniture bidding and negotiation, and contractor selection. The design was completed in full 3D renderings and showed specialty design of a lobby, board room, executive offices, open and private offices, support spaces, break room and lounge.

**Palo Verde Nuclear Generating Station- Metrology Lab - Tonapah, AZ**

Design Lead for renovation project of mission critical Metrology Lab. Assisted in design and coordinated construction documents to produce specific temperature and humidity controlled lab spaces. Collaborate with facilities group and end-users.

**Arizona Public Services - Deer Valley N2 Data Center, AZ**

Part of design team to evaluate current conditions and provide pricing documents to ensure compliance with current life safety codes.

**APS DVA Building Renovation - Goal of LEED Silver - Phoenix, AZ**

Bob aided in the design and oversaw the construction administration for this 60,000 SF administration building for Arizona Public Service. This major renovation utilizes universal design which will make the space flexible for many different user groups. The design incorporated APS standards for room sizes, furniture and finishes. The project also included all new mechanical, plumbing and electrical systems.

**5. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**  
(Present no more than five (5) projects. Complete one Section 5 for each project.)

- a. Project Title and Location (City and State): **Arizona Public Service, Various AZ. Cities**



- b. Year Completed – Professional Services: **2002 to Present (On-Going Contract)**
- c. Project Owner’s Information – Project Owner: **Jeff DeBenon, Capital Manager of Facilities**  
Project Owner’s Information – Point of Contact Name: **Jeff DeBenon**  
Project Owner’s information – Point of contact E-mail Address: [Jeff.debenon@aps.com](mailto:Jeff.debenon@aps.com)  
Project Owner’s Information – Point of contact Telephone Number: **(602) 250-4424**
- d. Dollar Amount of Project: **Contract Value has averaged \$2,500,000 Annually.**
- e. Total Cost of Project: **\$22,000,000 Annually**
- f. Brief description of project and relevance to this contract (Include scope, size, and cost):

FM Solutions started this relationship in 2002. We have an ongoing contract to perform Design, Project Management, Furniture Installation and ongoing Master Plan Services for them. These projects range from one station changes to large remodels of existing spaces or new buildings throughout the State of Arizona. Their typical scopes minimally include Programming, Test-Fitting, Design Development, Construction Documents, Project Bidding & Negotiation, Contractor Selection, FF & E, IT, Security and Move Coordination.

- Multi-year strategic alliance for facilities design and project management services with personnel co-located on site within Pinnacle West Facilities Department.
- Client portfolio consists of 120 buildings on 60 sites in Arizona, 1.5 million SF valued at \$350M.
- FM Solutions provides design services consisting of initial client programming, space planning, interior design, architectural design for new buildings, furniture layouts, and corporate standards.
- FM Solutions provides project management services to include supplier pre-qualification, bidding, construction management, furniture procurement, furniture reconfiguration, and move management.
- Projects include facilities renovation and new buildings consisting of offices, shops, service centers, warehouses and storage yards.

*"FMS has been our Architectural Design and Project Management Service provider for the last five years. My experience with this firm has always been that projects are completed on time within budget, and were handled in a professional manner. Their broad design knowledge, skill and keen understanding of Facilities Management from an owner's perspective has been a major factor in the success of all our projects."*

Jeff DeBenon, FMA, RPA  
Central Phoenix and Generation Facilities Manager  
Arizona Public Service Real Estate & Facilities Management Department

**5. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**  
(Present no more than five (5) projects. Complete one Section 5 for each project.)

- a. Project Title and Location (*City and State*): **Palo Verde Nuclear Generating Station (PVNGS)**  
**Tonapah, Arizona**



- b. Year Completed – Professional Services: **April 2009 to Present (On-Going Contract)**
- c. Project Owner’s Information – Project Owner: **Pinnacle West**  
Project Owner’s Information – Point of Contact Name: **Randall Neal, Manager of Facilities**  
Project Owner’s information – Point of contact E-mail Address: [Randall.Neal@aps.com](mailto:Randall.Neal@aps.com)  
Project Owner’s Information – Point of contact Telephone Number: **(602) 390-4878**
- d. Dollar Amount of Project: **Contract Value has averaged \$1,000,000 Annually**
- e. Total Cost of Project: **\$7,000,000 Annually**
- f. Brief description of project and relevance to this contract (Include scope, size, and cost):

FM Solutions provides full Architectural, Project Management, Move Management and Facility Support services for PVNGS. Collaborating with the owners we scope, cost estimate and develop projects. We have developed a clear and concise set of standards and performance specifications to streamline the owner’s facilities and reduce costs. Construction documents and specifications exceeded acceptable standards and are designed to support the client’s record drawing process and becoming a complete set of running as-builds. Collaborating with contractors our team developed processes to support construction, schedule and unforeseen costs. We also created a Master Plan for this customer, to include relocation of entrances, roadways, and additional buildings to enhance productivity.

Examples of two projects completed with this client include:

The 66,000 SF North Annex, scope included Assessments, Master Plan, Renovation and Universal Design. This phased interior remodel also included Project and Construction Services.

The 63,000 SF Outage Support Facility New Construction Building project was a traditional Design, Bid, Build project with full design, construction documents and construction administration services.

**5. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**  
(Present no more than five (5) projects. Complete one Section 5 for each project.)

- a. Project Title and Location (*City and State*): **NiSource**



- b. Year Completed – Professional Services: **2002 to Present (On-Going Contract)**
- c. Project Owner’s Information – Project Owner: **Randy K. Polster, Director of Facilities**  
Project Owner’s Information – Point of Contact Name: **Randy K. Polster**  
Project Owner’s information – Point of contact E-mail Address: [RKPolster@NiSource.com](mailto:RKPolster@NiSource.com)  
Project Owner’s Information – Point of contact Telephone Number: **(219) 647-4472**
- d. Dollar Amount of Project: **Contract Value was \$500,000**
- e. Total Cost of Project: N/A
- f. Brief description of project and relevance to this contract (Include scope, size, and cost):

The scope of work included an Independent Overview of existing building conditions, Facility Management departmental processes and operations across the utilities’ primary service territory. The evaluation process was based on sample benchmarking of existing building conditions across seven states and identifying industry best practices and proposed applications for Indiana’s FM Department.

This included:

- Conducting detailed Facility Condition Assessments
- Analyzing FM staffing levels
- Determining client/user satisfaction levels
- Developing organizational efficiency changes
- Performing financial impact analysis
- Identifying potential cost savings

FMS created an action plan to implement any potential recommendations using [www.facilitiesapps.com](http://www.facilitiesapps.com) powered by FM Solutions.

As part of the analysis, FMS completed comprehensive facility condition assessments of 23 buildings totaling 1,252,526 square feet.

**5. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**  
(Present no more than five (5) projects. Complete one Section 5 for each project.)

- a. Project Title and Location (City and State): **Coconino County - Arizona**



- b. Year Completed – Professional Services: **2007 to Present (On-Going Contract)**
- c. Project Owner’s Information – Project Owner: **Sue Brown, Director of Facilities**  
Project Owner’s Information – Point of Contact Name: **Sue Brown**  
Project Owner’s information – Point of contact E-mail Address: [sbrown@coconino.az.gov](mailto:sbrown@coconino.az.gov)  
Project Owner’s Information – Point of contact Telephone Number: **(928) 679-8804**
- d. Dollar Amount of Project: **Contract Value has averaged \$250,000 Annually**
- e. Total Cost of Project: **Varies**
- f. Brief description of project and relevance to this contract (Include scope, size, and cost):

Coconino County in Northern Arizona looked to us to conduct a 10-year Facilities Master Plan (FMP) for their growing county which included a series of facility condition assessments. As a follow up to the FMP initiative, the County requested our services again to take a further look into their mission critical facilities. Comprehensive facility condition assessments were performed which evaluated the building systems and equipment, as well as, identified any code violations. Recommended improvements to each site were provided along with a benchmarking analysis of how they stacked up to similar buildings and a strategic capital and O&M funding plan to maximize their financial allocations over the next ten years. We provided an asset management and maintenance analysis for 600K square feet.

*“As challenges have come up, FM Solutions has remained our go-to vendor for innovative ideas and strong solutions. I recommend them highly as a partner for local governments. They understand our challenges and work hard to ensure that the work product is tailored to our needs.”*

**Susan Brown, Coconino County, AZ**

**5. EXAMPLE PROJECTS WHICH BEST ILLUSTRATE PROPOSED TEAM'S QUALIFICATIONS FOR THIS CONTRACT**

*(Present no more than five (5) projects. Complete one Section 5 for each project.)*

- a. Project Title and Location (*City and State*): **Apollo Development Corporation, Phoenix**



- b. Year Completed – Professional Services: **2002 to Present (On-Going Contract)**
- c. Project Owner’s Information – Project Owner: **Brent Fuller, Director of Construction**  
Project Owner’s Information – Point of Contact Name: **Brent Fuller**  
Project Owner’s information – Point of contact E-mail Address: [brent.fuller@apollogrp.edu](mailto:brent.fuller@apollogrp.edu)  
Project Owner’s Information – Point of contact Telephone Number: **(602) 418-3818**
- d. Dollar Amount of Project: **Contract Value is \$250,000 Annually**
- e. Total Cost of Project: **\$15,000,000 per Mission Critical Facility**
- f. Brief description of project and relevance to this contract (Include scope, size, and cost):

FM Solutions has provided on-going services to Apollo Group’s Mission Critical Facilities. FM Solutions provided design, construction documents, bid administration, and construction administration for a 45,000 SF shell building. The improvements included Apollo's national server room with an ups battery room and optional stand-by auxiliary generator, labs, offices, conference rooms, training classrooms, open office areas and support areas. The support spaces included a central security room, lobby, toilets, break rooms, coffee/vending, receiving, janitorial and electrical rooms.

Our Expedited approach to this project:

A pre-design conference was held to refine the scope of work, including systems options, selections and physical space requirements for the special equipment and a site verification for all building systems. Construction documents were completed and the calculations consisted of heating and cooling load calculations to address the excessive heat loads generated within the server rooms and the exhaust requirements for the ups battery room. Construction documents also included owner's specific requirements for the phone and data systems. FM Solutions held bi-weekly meetings with the owner and contractor to validate schedule cost and value engineering prior to construction documents being complete.

FM Solutions also provided coordination with the utility companies for the on-site power and telephone upgrades. Plans were submitted, reviewed and approved by the city of phoenix in an expedited manner. Special considerations were required for the auxiliary generator. Addressing noise levels at property lines, an acoustical consultant was used to calculate the best methods to allow for compliance.

*"FM Solutions has provided the Apollo Group with projects that are high in design quality, are cost compliant, and meet our rigorous schedule demands."*

Brent Fuller, PM Apollo Development Corp

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## 6. ADDITIONAL INFORMATION

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a. PROVIDE ANY ADDITIONAL INFORMATION YOU FEEL MAY BE NECESSARY TO DESCRIBE YOUR FIRMS QUALIFICATIONS. (ATTACH ADDITIONAL SHEETS AS NEEDED.)

FM Solutions is a full-service resource for the lifespan of our client's buildings. Working with progressive organizations in the public and private sectors, our team has extensive experience in every aspect of the planning, design, implementation, operations and maintenance services. We understand what it takes to create and sustain an environment that functions efficiently and effectively. Our personalized, collaborative approach delivers tailor-made solutions that save our clients time and money.

Some basic steps we take are as follows:

Select appropriate supporting team:

- The Core Team at FM Solutions has already been assigned to this account. We always request two weeks of adjustment time to free up this core team. Additional staff is assigned to this team as more is known about the specific scope of work. We have found this to be the best approach to "relationship work" as the projects are not always clearly defined, and the work requirements are ever changing. What is most important is for our Core Team to get to know YOU! The transfer of a project to our Core and Support Teams should always be crisp and efficient! By having one point of contact we consistently maintain the knowledge of our clients specific needs. We create a team of at least three qualified professionals, so that if one team member becomes unavailable, we are always more than one deep.
- We use three different MP&E sub-consultants based upon the project they are most suited. We continue to use that same assigned sub-consultant to the same building so that the owner benefits from their ongoing building knowledge. Our three MP&E sub-consultants are Peterson and Associates, LSW and Energy Systems Design (ESD). We use Gervasio and Associates for Structural Engineering, Hubbard Engineering for Civil and Gilmore Parsons for Landscaping. If there is an owner preferred sub-consultant that we have not listed, we are open to discussing ongoing use of that same sub-consultant for the project.

Effects of "Low Bid" we take:

- We have considerable experience in low bid construction. It has been our experience that this approach requires a higher degree of Construction Document quality to facilitate a smoother project. There are typically two types of "low bid" processes:
  - The highest risk "low bid" process to owner is the one that is an open bid and no pre-qualification is done. If this is the approach our owner prefers, we recommend information requested from the bidder that will give us indications of their thought processes, as a part of their bid. We then request from the owner to consider taking lowest evaluated bidder, which allows consideration beyond just low cost to be taken.
  - The lowest risk "low bid" processes to owner is one that prequalifies bidders and then bids to the best qualified bidders. The AIA document A305 is a document that can be used for prequalification if needed.

FMS understands each project for our client, creates different demands, but will always develop a comprehensive scope as quickly as possible:

- FMS will be held to a budget, schedule and high quality, as well as, limiting change orders that can disrupt the flow of project because they come as a surprise.
- FMS will provide no frill, quick turnaround services, that assist in decision making and communication to our client
- FMS will bid project out in a manner that allows dependable costs, schedule and quality that is defendable
- FMS will assess project needs to minimize costs for ongoing maintenance, so that long term function and appearance are dependable, reliable, flexible and pleasant.
- FMS will be our client's one point of contact to communicate what is needed. The necessary Architects, Interior Designers, Engineers, etc. are all managed by us in a way that will keep you well informed during all stages of the project.
- FMS will be an extension of our client, and feel the pressures and desires of your staff in a way that allows everyone to feel successful.

## 6. ADDITIONAL INFORMATION

How FMS assist clients from getting into unanticipated budget expenditures:

We have developed a cost and estimating tool that allow us to sit down with decision makers, ask questions and depending upon answers gives you what your budget would be in that same meeting. This then allows the decision makers to alter their thoughts until the desires are aligned with the costs. If there is an already approved budget than this same approach is used to assist in modifying desires to align or develop a strategy of where additional funding could come from. We advise our clients to make sure this is aligned before they proceed. Many firms wait until the construction drawings are near complete before they align costs with desires and call this Value Engineering. The most cost effective Value Engineering is and should be done at the start of the project, not after everyone has completed the drawings and then the drawings have to be changed.

Our cost estimating tool is also our programming tool. It forces questions to be answered in all disciplines to include FF&E, IS and Security. We also have a tool related to existing condition which is called Facility Apps. This tool identifies statistical life of all equipment so that we can up front identify to our client how long the equipment will be operational and when it should be replaced along with associated costs.

We design to accommodate functions of all users, not just the requesting occupant. This is a mind set our firm has from the beginning. We have Certified Facility Managers that makes sure that we are designing with the thought of many users eventually using the space, and LEED certified people reviewing to make sure we are not the cause of multiple major remodels due to not thinking about keeping our design flexible so that we are minimizing impacts to the community landfill.

We believe there are clients, who are the occupants of the space we design to, there are customers that are concerned about making sure the big long term life cycle is taken into account, there are security and infrastructure issues and politicians and bosses that all are needing to have some level of understanding on a project. We have web based reports driven off of our schedules and timecards that report status on each of our projects related to schedule, budget, RFI's etc. We also typically request formal approvals at 30/60 and 90 percent completion points of our work so everyone is up to date as we progress. We can make our communication plan as wide or as concise as needed by all of our clients depending on what the need is.

All construction documents need to be constructible, high quality, and well-coordinated between disciplines. We have been working on an ongoing checklist for over eight years. This check list is one that is added to from RFI's, Lesson Learned sessions after projects have been completed and past break downs we have had. This list addresses all disciplines. We expect our whole team to look at this list on each job and assure themselves and each other that it has been addressed by the actual people producing the documents, prior to review of the registrant's review and eventual signing. The result of this process has been less RFI's from contractors, less errors on drawings and less change orders on construction.

We typically recommend specific information from each company on the "Form of Proposal". Yes, we like to be a participant in the development of the Request for Proposals from the contractor. For many of our clients, we actually create this for them which assist their procurement officers out when they are stretched too thin. We create this information in such a manner that allows us to back feed that information into our cost estimating tool mentioned earlier. If possible our preferred approach on high end projects is to pre-qualify bidders. We have specific methods for this as well.

## 6. ADDITIONAL INFORMATION

We self – perform all work associated with Architecture, Interior Design, Facility Management, Assessments, Project Management, Cost Estimates and all services associated with these disciplines.

We have specific teams that have been working with us for many years as an extension of our team which include the following Mechanical, Electrical, Plumbing, Fire Protection, Fire Alarm, Landscape and Civil Design, Geo- Technical and Structural Engineering. We also have consultants that are less used for Commissioning, Retro-commissioning, Hazardous Waste Identification and supervision as well as Traffic Engineering.

FM Solutions has developed a planning/estimating tool that allows us to ask upfront questions in predetermined areas, so that nothing is missed. Depending upon answers, the cost is determined based upon square feet. The intent of this tool is to plan and develop the quality of the development prior to spending much design time. This is similar to when you build your dream car on the internet; you typically tweak the answers until you can afford the car.

One invaluable tool we use is what we call our “Portal”. This has been developed by FM Solutions specifically for our Project Managers to track various costs, and percent completed on projects. We use the Project Management portion of this to track General Contractors costs, separate from the FF&E, vendor, Info Systems, Security and Design Costs. Status is automated to specific clients on the basis of actual vs. estimated dashboard charts.

FM Solutions also has Standard Schedule Templates created for different types of projects/clients which have pre-established milestones that are tracked. We also have pre-established spreadsheets that track RFI, Submittals etc. durations and status.

FM Solutions Quality Control Plan is ongoing and is based upon documentation from our “Lessons Learned Program”. After the completion of every project our teams evaluate what was successful and where improvement was needed. This checklist is available upon request, and is used by new employees, as well as, veterans to assure value and quality performance in all present and future projects.

FM Solutions has a Safety Manual for all our Project Managers to follow. Most of our staff have been through OSHA Training, and have been certified.

FM Solutions prefers to always start with an established agreed upon budget. If there is not one developed, we prefer to develop one prior to start of any design work. Our Design Team will perform all “Value Engineering” on jobs up front in the project, and not after drawings have been finished.

If work is to be within an existing building, we prefer to assess the facility prior to any design work to make sure we have reasonable record drawings.

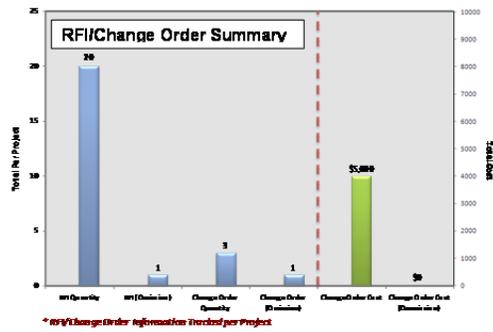
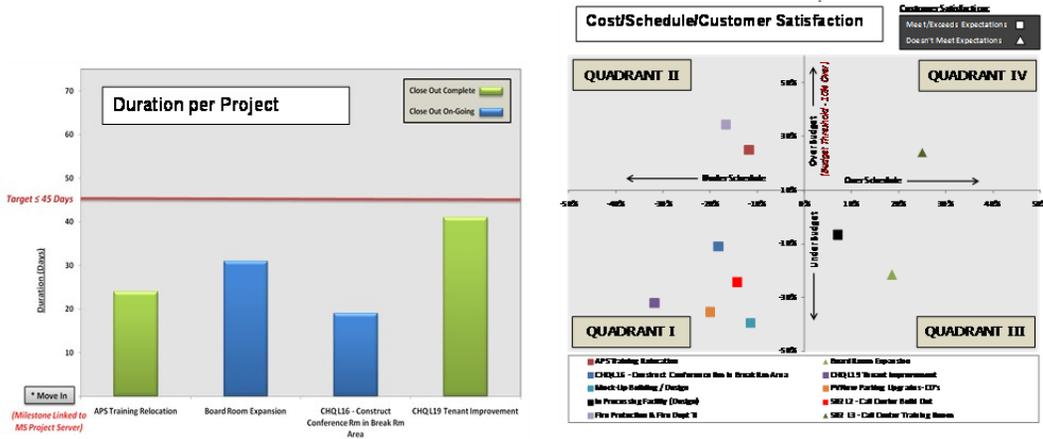
We prefer involving our Engineers in our project early on in the design process.

If owner has standards and/or preferences they desire adhered to, we prefer to have that up front. If they have none, we suggest we assist in development of some with assistance from their Facility Manager. If work is to be within an existing building, we prefer to not only meet with client of the new space, but also the Facility Manager of the space to be remodeled, so we clearly understand what is already known about the building/assets.

Unless informed otherwise, we typically design to accommodate LEED Silver criteria in all that we do. This does not mean the client is required to apply for LEED certification.

## 6. ADDITIONAL INFORMATION

We recommend Key Performance Indicators be established on Projects. Some examples are as follows:



Budget vs. Actual Vs. Percent Complete						
Project #	Project Name	Budget Vs. Actual		Budget % Complete	Schedule % Complete	Variance % Complete
8100.085	CHQ L19 Tenant Improvement	Budget	\$ 111,445	100%	100%	0%
		Actual	\$ 75,759			
9227.038	Mock-Up Building / Design	Budget	\$ 320,481	12%	20%	8%
		Actual	\$ 23,365			
9227.008	PV New Parking Upgrades- CD's	Budget	\$ 62,680	94%	98%	4%
		Actual	\$ 39,854			
9227.036	In Processing Facility (Design)	Budget	\$ 428,542	12%	9%	-3%
		Actual	\$ 56,879			

7. ANNUAL AVERAGE PROFESSIONAL SERVICES REVENUES OF FIRM FOR LAST 3 YEARS

a. Percentage of Total Work Attributable to State, Federal and Municipal Government Work:	<b>25%</b>
b. Percentage of Total Work Attributable to Non-Government Work:	<b>75%</b>

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8. AUTHORIZED REPRESENTATIVE. The foregoing is a statement of facts.

Signature: 

Name: Curtis L. Slife AIA, NCARB, CFM, IFMA Fellow

Date: December 12, 2013

Title: President