



City of Ketchum  
City Hall

December 16, 2019

Mayor Bradshaw and City Councilors  
City of Ketchum  
Ketchum, ID 83340

Mayor Bradshaw and City Councilors:

**Recommendation to Approve Contract 20440 with Dennis Potts Project Management, LLC  
For Construction & Project Management Services**

**Recommendation and Summary**

Staff is recommending the council approve Contract 20440 with Dennis Potts Project Management, LLC for construction and project management services and adopt the following motion:

**"I move to approve Contract 20440 for \$185,856.00 with Dennis Potts Project Management, LLC for construction management services and authorize the Mayor to sign the Agreement."**

The reasons for the recommendation are as follows:

- The City has secured voter approval to proceed with the bond-funded construction of a fire station.
- Construction management services were included in the \$11.5 million project budget.
- The City of Ketchum does not have the specialized resources to perform the work in-house and a competitive procurement was conducted in accordance with State Statute and City Policy.

**Introduction and History**

On November 5, 2019, voters in the City of Ketchum approved a ballot question concerning the construction of a fire station using the proceeds from a \$11.5 million bond sale. The \$11.5 million project budget included all project elements. A construction manager to act as the owner's representative throughout the project was identified as one necessary support contract.

**Analysis**

Because of its specialized nature, and the relative infrequency that it is required, the City of Ketchum has historically contracted out similar construction management work. So, on November 7, 2019, the City of Ketchum released a Request for Proposals (RFP) publicly on its website and also sent the documents to known construction project management firms. The RFP was additionally advertised in the Idaho Mountain Express on November 13 and 20, and continuously posted on several industry websites during the same period. On November 22, 2019, six proposals were received by the City of Ketchum.

A selection committee of staff from several departments reviewed and evaluated the proposals. A short-list of the most highly-ranked proposers was created and interviews were scheduled with three firms on December 9, 2019. As a result of the evaluations, Dennis Potts Project Management, LLC is being recommended to City Council for contract award.

**Financial Impact**

Construction management services were included in the \$11.5 million project budget.

Attachments

- Attachment A: Contract 20440

## PROFESSIONAL SERVICES AGREEMENT #20440

This Professional Services Agreement ("Agreement") is made by and between the City of Ketchum, Idaho, an Idaho municipal corporation, organized and existing under the laws of the State of Idaho ("City"), and Dennis Potts Project Management, LLC ("Contractor").

### RECITALS

To complete the fire station design and construction project Dennis Potts Project Management, LLC submitted a scope and fee estimate for construction management services. That scope and fee estimate, along with the original RFP and addenda, are incorporated herein and made a part of this Agreement by this reference and attached as Exhibit B.

WHEREAS, Contractor desires to provide construction management services for the Ketchum Fire Station Project pursuant to the terms and conditions hereof; and

Whereas, the City is empowered by Idaho Code section 50-301 to enter into contracts as may be deemed necessary to promote the welfare of the City and its residents, and to implement projects approved within the adopted budget; and

NOW, THEREFORE, on the basis of the foregoing recitals, and upon motion duly passed by the Ketchum City Council, and for the consideration set forth herein, the parties agree as follows:

### AGREEMENT

Contractor agrees to provide professional services pursuant to the terms and conditions of this Agreement.

#### 1. SCOPE OF WORK:

Contractor will provide the construction management services in accordance with the Scope of Work in Exhibit A which may generally be described as acting as the owner's representative through the design, construction, and commissioning of the fire station project.

**2. AMOUNT AND METHOD OF PAYMENT:** The City agrees to pay Contractor on a time and material basis not to exceed amount of \$185,856 for services rendered under this Agreement.

- a. Contractor shall maintain time and expense records and make them available to the City monthly and provide monthly invoices in a format acceptable to the City for work performed to the date of the invoice. Each invoice shall specify charges as they relate to specific tasks. Each invoice shall also specify current billing and previous payments, with a total of costs incurred and payments made to date.
- b. All invoices shall be paid by the City within forty-five (45) days of receipt of proper invoice unless no funds are available, then as soon as funds become available. Uncontested invoices paid after forty-five days may be subject to the statutory rate of interest pursuant to Idaho Code section 67-2302.
- c. If the services subject to a specific invoice do not meet the requirements of this Agreement as the City may determine, the City shall notify Contractor in writing and provide specific deficiencies in the work that do not meet the requirements. Contractor

shall have seven (7) working days to correct or modify the work to comply with the requirements of the Agreement as set forth in the City's written notice. If the City again determines the work fails to meet the requirements, the City may withhold payment until deficiencies have been corrected to the City's satisfaction or may terminate this Agreement for cause as set forth in Section 19 of this Agreement.

**3. RIGHT OF CONTROL:** The City agrees that it will have limited right to control or direct the details, manner, or means by which Contractor accomplishes the results of the services performed hereunder. Contractor agrees, however, that its other contracts and services shall not interfere with its performance under this Agreement. Contractor agrees to coordinate project schedules and respective commencements and deadlines the City Project Manager or City Administrator may establish.

**4. INDEPENDENT CONTRACTOR RELATIONSHIP:** Contractor is not an employee, servant, agent, partner, or joint venture of the City. The City shall determine the work to be done by Contractor, but Contractor shall determine the legal means by which it accomplishes the work specified by the City. This Agreement shall not be construed to create any employer-employee relationship between the City and Contractor.

**5. RECORDS ACCESS AND AUDITS:** Contractor shall maintain complete and accurate records with respect to costs incurred and manpower expended under this Agreement. All such records shall be maintained according to generally accepted accounting principles, shall be clearly identified, and shall be readily accessible. Such records shall be available for review by the City representatives for three (3) years after final payment. Copies shall be made available to the city upon request.

**6. FEDERAL, STATE, AND LOCAL PAYROLL TAXES:** Neither federal, state, or local income taxes nor payroll taxes of any kind shall be withheld and paid by the City on behalf of Contractor or the employees of Contractor. Contractor shall not be treated as an employee with respect to the services performed hereunder for federal or state tax purposes. Contractor understands that Contractor is solely responsible to pay, according to law, Contractor's income tax. Contractor further understands that Contractor may be liable for self-employment (Social Security) tax to be paid by Contractor according to law.

**7. LICENSES AND LAW:** Contractor represents that it possesses the requisite skill, knowledge, and experience necessary, as well as all licenses required, if any, to perform the services under this Agreement. Contractor further agrees to comply with all applicable laws, ordinances, and codes of federal, state, and local governments in the performance of the services hereunder.

**8. FRINGE BENEFITS:** Because Contractor is engaged in its own independently established business, Contractor is not eligible for and shall not participate in any employee pension, health, or other fringe benefit plans of the City.

**9. WORKER'S COMPENSATION:** Contractor shall maintain in full force and effect worker's compensation and employer's liability insurance for Contractor and any agents, employees, and staff that Contractor may employ, and provide proof to the City of such coverage or that such worker's compensation insurance is not required under the circumstances.

**10. EQUIPMENT, TOOLS, MATERIALS, OR SUPPLIES:** Contractor shall supply, at its sole expense, all equipment, tools, materials, and/or supplies to accomplish the services to be



provided herein.

**11. PROPRIETARY RIGHTS:** All data, materials, reports, maps, graphics, tables, memoranda, and other documents or products developed under this Agreement whether finished or not shall become the property of the City, shall be forwarded to the City at its request, and may be used by the City for any business or municipal purpose. The City agrees that if it uses products prepared by Contractor for purposes other than those intended in this Agreement, it does so at its sole risk.

**12. CONFIDENTIALITY:** Contractor agrees to maintain confidentiality of all work product produced under this Agreement, including both interim and draft, materials, reports, maps, graphics, tables, memoranda, and other documents unless and until the City signifies its written approval that such work product may be published as final work product subject to the public records laws of the state of Idaho. The City reserves the right to distribute the final work product as it sees fit provided that Contractor may use final reports as approved and adopted by the Ketchum City Council in the marketing of its firm.

**13. TERM OF AGREEMENT:** This Agreement shall commence as of the effective date specified in Section 30 and shall remain in effect until September 30, 2020 unless terminated by either party as specified as set forth in this agreement.

**15. ENTIRE AGREEMENT:** This Agreement, along with any and all exhibits and appendix attached hereto and incorporated herein by reference, contains the entire agreement of the parties and supersedes any and all other agreements or understandings, oral or written, whether previous to the execution hereof or contemporaneous herewith.

**16. GENERAL ADMINISTRATION AND MANAGEMENT:** The Planning and Building Director and/or the City Administrator or his/her designee shall be the City's representative and shall oversee and approve all services to be performed, coordinate all communications, review and approve all invoices, and carry out any and all tasks as may be required under this Agreement.

**17. CHANGES:** The City reserves the right to make changes from time to time in the scope of services to be performed hereunder. Such changes, including any increase or decrease in Contractor's compensation, which are mutually agreed upon by and between the City and Contractor, shall be incorporated in written amendments to this Agreement.

**18. AMENDMENTS:** This Agreement may be amended only in writing upon mutual agreement of both the City and Contractor.

**19. ASSIGNMENT:** It is expressly agreed and understood by the parties hereto that Contractor shall not have the right to assign, transfer, hypothecate, or sell any of its rights under this Agreement except upon the prior express written consent of the City.

**20. TERMINATION OF AGREEMENT:**

1. **FOR CAUSE DUE TO BREACH:** If Contractor shall fail to fulfill its obligations in compliance with the scope of work or if Contractor shall violate any of the covenants, agreements, or stipulations of this Agreement, the City shall thereupon have the right to terminate this Agreement by giving written notice to the Contractor and specifying the effective date thereof at least fifteen (15) days before the effective date of such termination. If this Agreement is terminated for cause, Contractor shall be entitled to receive just and equitable

compensation for any work satisfactorily completed hereunder.

Notwithstanding the above, Contractor shall not be relieved of liability to the City by virtue of any breach of this Agreement by Contractor, and the City may withhold any payments to Contractor for the purpose of setoff until such time as the exact amount of damages due the City from Contractor is determined. Contractor shall also provide the City all products or works of consulting generated to date of termination.

2. **TERMINATION BY THE CITY:** The City reserves the right to terminate this Agreement at any time, for any reason, by giving at least fifteen (15) days' notice in writing to Contractor. If this Agreement is terminated by the City as provided herein, Contractor shall be paid for the work performed prior to termination, less payment or compensation previously made. Contractor shall also provide the City all products or works related to this Project generated to date of termination.

3. **TERMINATION:** The obligation to provide further services under this Agreement may be terminated by Contractor upon thirty (30) days' written notice. Such termination shall be based upon substantial lack of performance by the City under the terms and conditions of this Agreement when said substantial lack of performance is through no fault of Contractor. If this Agreement is terminated by Contractor, Contractor shall be paid for services rendered and for reimbursable expenses incurred to the date of such termination.

**21. NOTICES:** Any and all notices required to be given by either of the parties hereto, unless otherwise stated in this Agreement, shall be in writing and be deemed communicated when mailed in the United States mail, certified, return receipt requested, addressed as follows:

To CITY: City of Ketchum  
Attn: Grant Gager, Director of Finance & Internal Services  
P.O. Box 2315  
Ketchum, ID 83340

To CONTRACTOR: Dennis Potts Project Management, LLC  
Attn: Dennis Potts, Principal  
PO Box 3007  
Ketchum, Idaho 83340

**22. DISCRIMINATION PROHIBITED:** In performing the services required herein, Contractor agrees not to discriminate against any person on the basis of race, color, religion, sex, national origin or ancestry, age, or handicap. Violation of this section shall constitute a material breach of this Agreement and deemed grounds for cancellation, termination, or suspension of the Agreement by the City, in whole or in part, and may result in ineligibility for further work for the City.

**23. STANDARD OF SERVICE:** Contractor shall provide services as described in this Agreement. These services will be performed in accordance with generally accepted professional practices for the scope of this project. Contractor makes no other warranty either expressed or implied.

**24. INDEMNIFICATION:** Contractor agrees to indemnify, defend, and hold harmless the City and its officers, agents, employees and City Council from and against all claims, losses, actions,

or judgments for damages or injury to persons or property arising out of or resulting from the negligent performances or activities of Contractor, Contractor's agents, employees, or representatives under this Agreement.

**25. INSURANCE:** Contractor agrees to obtain and keep in force during its acts under this Agreement a professional liability insurance policy with coverage limits over \$1,000,000.00 per occurrence. Certificate of proof of insurance will be provided to the City. Contractor shall provide proof of coverage as set forth above to the City before commencing its performance as herein provided and shall require insurer to notify the City ten (10) days prior to cancellation of said policy. Deliver certificates of insurance and endorsements required by this Article to:

City of Ketchum  
Attn: Grant Gager, Director of Finance & Internal Services  
PO Box 2315  
Ketchum, ID 83340  
Telephone: (208) 727-5086

**26. NONWAIVER:** Failure of either party to exercise any of the rights under this Agreement or breach thereof shall not be deemed to be a waiver of such right or a waiver of any subsequent breach.

**27. APPLICABLE LAW:** Any dispute under this Agreement or related to this Agreement shall be decided in accordance with the laws of the state of Idaho.

**28. SEVERABILITY:** If any part of this Agreement is held unenforceable, the remaining portions of the Agreement will nevertheless remain in full force and effect.

**29. ATTORNEY FEES:** Should any litigation be commenced between the parties hereto concerning this Agreement, the prevailing party shall be entitled, in addition to any other relief as may be granted, to costs and reasonable attorney fees as determined by a court of competent jurisdiction. This provision shall be deemed to be a separate contract between the parties and shall survive any default, termination, or forfeiture of this Agreement.

**30. EFFECTIVE DATE:** The effective date of this Agreement shall be the day this Agreement is signed by the City.

**31. DISPUTES:** In the event that a dispute arises between the City and Contractor regarding application or interpretation of any provision of this Agreement, the aggrieved party shall promptly notify the other party to this Agreement of the dispute within ten (10) days after such dispute arises. If the parties shall have failed to resolve the dispute within thirty (30) days after delivery of such notice, the parties agree to first endeavor to settle the dispute in an amicable manner by non-binding mediation before resorting to litigation. Should the parties be unable to resolve the dispute to their mutual satisfaction within thirty (30) days after such completion of mediation, each party shall have the right to pursue any rights or remedies it may have at law or in equity.

**32. SUCCESSORS IN INTEREST:** The provisions of this Agreement shall be binding upon and shall inure to the benefit of the parties hereby and their respective successors and assigns.

**33. MISCELLANEOUS:** Contractor has not been retained to supervise, direct, or have control over any contractor's work. Contractor specifically does not have authority over or responsibility for the

means, methods, techniques, sequences, or procedures of construction selected by contractor(s) for safety precautions and programs to the work of contractor(s) or for any failure of contractor(s) to comply with laws, rules, regulations, ordinances, codes, or orders applicable to contractor(s) furnishing and performing their work. Accordingly, Contractor can neither guarantee the performance of the construction contracts by contractor(s) nor assume responsibility for the failure of contractor(s) to furnish and perform their work in accordance with the contract documents.

**34. CONFLICT OF INTEREST:** Contractor shall disclose any conflict of interest to the City that may arise or exists with any of Contractors current or former employers, clients, contractors or the like of or regarding any work, information, data, that may relate to the subject matter whether it is within the Contractor's scope of work or not. In the event a conflict of interest is identified, Contractor shall immediately disclose the conflict and the City may, in its sole discretion determine that this Agreement will terminate, or agree to measures to address the conflict and limit Contractor's scope of work to avoid the conflict. Failure to promptly disclose a conflict of interest constitutes Contractor's breach of this Agreement.

IN WITNESS WHEREOF, THE CITY and Contractor have executed this Agreement as of the effective date specified above.

CITY OF KETCHUM

CONTRACTOR – Dennis Potts Project Management, LLC

By: \_\_\_\_\_  
Neil Bradshaw  
Mayor

By: \_\_\_\_\_  
Dennis Potts  
Principal

DATE: \_\_\_\_\_

DATE: \_\_\_\_\_

ATTEST:

By: \_\_\_\_\_  
Robin Crotty  
City Clerk

DATE: \_\_\_\_\_

### Scope of Work

#### General

Serve as the City’s Project Manager through the remainder of the building’s design, construction, and commissioning process. The goal is to provide consistent, transparent, and organized processes through the design, construction, and close-out phases. It is expected that responses to inquiries and requests will be provided within five (5) business days of delivery to Contractor. The project schedule is anticipated to be as follows:

Milestone	Date
CM Contract Award by Council	December 16, 2019
Design Application to P&Z	January 2020
Project Construction Start	May 2020
Project Close-out	September 2021

The following duties will be required of the construction management services firm during each phase of the project:

#### Design Phase Activities:

1. Lead project through the City Planning and Zoning process.
2. Participation in community and City Council meetings if necessary.
3. Constructability analysis and technical review of design documents.
4. Creation and management of project budget, schedule, and risk register.
5. Value engineering at the 30%, 60%, 90% design stages, as well as post-bid.
6. Lead evaluation of the project delivery method and then manage the selection process (Design-build, CM-GC, DBB).
7. Bid review and analysis, including unit cost reviews.
8. Prepare contracts and agreements as necessary.
9. Assistance with selection of additional project contractors and consultants.

#### Design Phase Deliverables:

1. Successful management of project through design, construction drawings, and permit submittal and application.
2. Baseline project master schedule (all phases and contracts).
3. Baseline project budget.
4. Baseline project risk register.

5. Bid review and analysis

**Construction Phase Activities:**

1. Full time on-site project manager/superintendent including conduct of bi-weekly on-site project management meetings with minutes and action item logs.
2. Construction quality control monitoring including management of testing and inspections.
3. Management and documentation of the request for Information processes.
4. Change order management and documentation, including maintenance of the logs.
5. Project document management.
6. Contract administration support services.
7. Construction pay request, change order, and claim review and analysis.
8. Maintenance of project budget, schedule, and risk register.
9. Manage multiple contractors and manage construction activity staging and coordination.

**Construction Phase Deliverables:**

1. Monthly updates to project schedule, budget, and risk register.
2. Bi-weekly project report including all open RFIs and Issues.
3. Change Order log, including status.
4. Letter and communication log.
5. Analysis of claims submitted, including claim log.
6. Monthly construction pay request analysis

**Close-out Phase Activities:**

1. Perform final inspection and commissioning services.
2. Maintain project close-out punch-list.
3. Compile as-built drawings and documents for transfer to City.
4. Project close-out and warranty services.
5. Project-related expert witness services arising from claims.

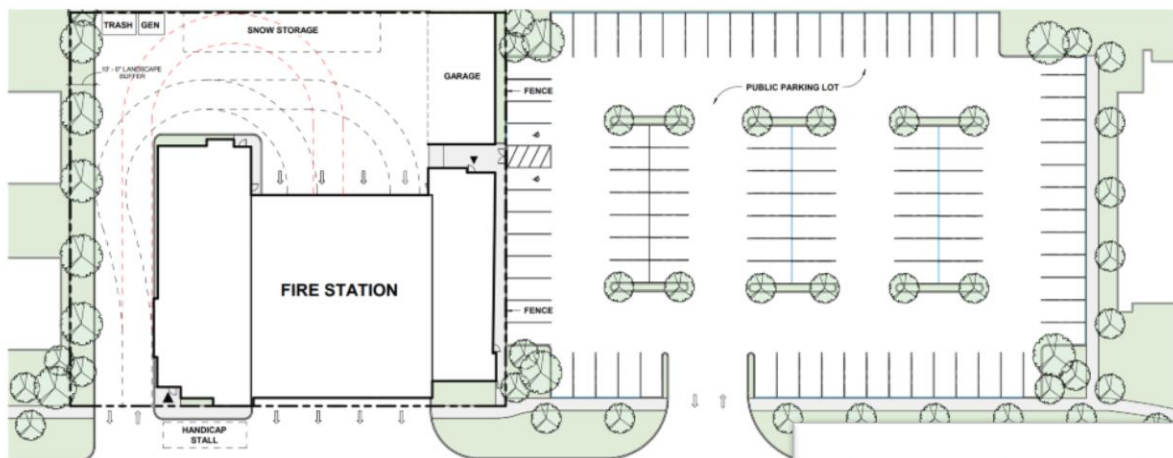
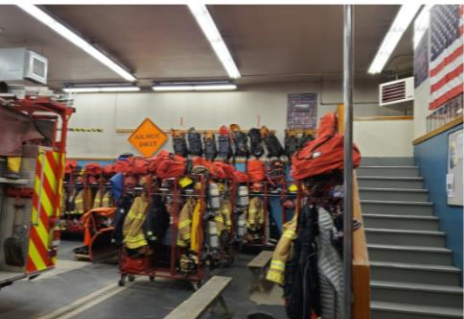
**Close-out Phase Deliverables:**

1. Punch-list of work to be completed upon substantial completion.
2. Final commissioning checklist.
3. Warranty status log and information.
4. As-built drawing compilation.



# DPPM

## PROJECT MANAGEMENT



*Proposal for:*  
**Ketchum Fire Station**  
**November 22, 2019**

DPPM Project Management  
Ketchum Innovation Center  
180 W. 6<sup>th</sup> St, Ketchum, Idaho 83340  
[www.dppmllc.com](http://www.dppmllc.com)

**Dennis Potts**  
President

DPPM Project Management



**DPPM**  
PROJECT MANAGEMENT

PO Box 3007  
Ketchum, ID 83340  
dpotts@dppmllc.com  
www.DPPM LLC.com

November 22, 2019

Mr. Grant Gager  
City of Ketchum  
480 East Avenue North  
Ketchum, Idaho, 83340

Dear Mr. Gager,

It is with great pride and excitement that I submit our first proposal for a project in Ketchum. Having been in Elkhorn, Sun Valley for over five years and then deciding to strategically move our corporate headquarters from California to Ketchum last December, we have looked for the right time to offer our extensive construction management services to the community. I am a permanent resident of north Hailey since December 2018 and appreciate the opportunity to propose on a project close to home.

DPPM Project Management is a ten-year-old firm made up of sixteen project and construction managers around the country. Our people are primarily former contractors and architects, military veterans and business owners. Our firm has completed numerous LEED certified projects. Many have won design awards adding efficiency and sustainability value for our clients.

The attached proposal addresses four main points:

1. How we will validate and control the \$11,500,000 budget
2. Our advanced PMP methods of online communication, accountability and document sharing insure our team's collaborative and effective success.
3. Techniques we use to predict the project's timeline and make adjustments in order to meet the schedule
4. Our track record for overseeing and regulating the general contractor to reduce their ability to increase their fees through change orders.

With this project winning the public's vote on Nov 6 by such a small margin will require us to help the City show the voters that their funds are being protected and used effectively. The selected project manager will need to have documentation in place that tracks and reports out what decisions have been made and how they were made. Our extensive experience and proficiency at working on public projects demonstrates our effectiveness managing the full disclosure that is required. Our government funded clients include University of California, Los Angeles World Airports, County of Riverside and State of Idaho Health & Welfare.



Grant Gager  
November 22, 2019  
Page 2

We have compiled our answers in this proposal and have prepared additional documents that will be better presented in an interview setting. We look forward to the opportunity of sharing additional in-depth information about our proposal, team and organization as the selection process progresses.

Thank you for your consideration.



Dennis J. Potts  
President, DPPM Project Management



**KETCHUM WAGON  
DAYS SPONSOR**



**DPPM**  
PROJECT MANAGEMENT

## Response to City of Ketchum Request for Proposal

### SUMMARY

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DPPM Project Management

#### COMPANY INFORMATION -

A SUMMARY OF OUR COMPANY. SEE ATTACHED “COMPANY PROFILE”

RESUME OF PROJECT LEAD - DENNIS POTTS. RESUMES ALSO ATTACHED FOR FOUR BACK-UP MANAGERS AND SUPPORT TEAM.

CITY AND STATE OF IDAHO BUSINESS REGISTRATIONS ARE ATTACHED

NUMBER OF YEARS **DPPM** HAS PROVIDED CONSTRUCTION MANAGEMENT SERVICES: TEN

ANNUAL VOLUME OF WORK FOR THE DPPM OFFICE TO SERVE THIS PROJECT WHICH IS THE HEADQUARTERS OFFICE

2019: \$85,000,000

2009 TO 2019: \$720,000,000

VOLUME OF WORK MANAGED BY DENNIS POTTS OVER THE PAST FIVE YEARS: \$260,000,000

PERCENTAGE OF PUBLIC VERSUS PRIVATE WORK OVER TEN YEARS:

PUBLIC WORK VALUE: 25%

PRIVATE SECTOR WORK VALUE: 75%

OVERALL FIRM WORKLOAD:

**PRESENT WORKLOAD:** The economy and DPPM have been doing well these past few years. We are currently 95% booked and supplement some requirements with part-time consultants.

**FUTURE WORKLOAD:** We recently finished our \$143MM project with University of California and another six commercial projects. We are pursuing new work to fill these voids. This Fire Station fits very well into our projected workload.

#### DESCRIPTION OF EXPERIENCE WITH CONSTRUCTION MANAGEMENT SERVICES:

**WBS:** WBS IS A MAIN COMPONENT OF PMP TRAINING. DPPM USES THIS STRUCTURE ON OUR BUDGETS - SEE ATTACHED SAMPLE BUDGET.

**CPM METHOD OF SCHEDULING.** OUR SCHEDULES MONITOR THE CRITICAL PATH ON A WEEKLY BASIS. OUR SCHEDULES ARE A DYNAMIC TOOL USED DURING MEETINGS TO

“Experience with Proven Results”

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# Response to City of Ketchum Request for Proposal

**DPPM**  
PROJECT MANAGEMENT

## SUMMARY

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ILLUSTRATE ANY POTENTIAL CHANGES TO FINAL MOVE-IN WHILE IN THE REAL TIME OF A MEETING.

PROJECT EARNED VALUE MANAGEMENT ANALYSIS: WE ARE OUR CLIENT'S ADVOCATE IN ASSISTING WITH CASH FLOW ANALYSIS BASED ON PERCENTAGES OF COMPLETION.

CHANGE ORDER MANAGEMENT: OUR PHILOSOPHY TO KEEP CHANGE ORDERS LOW ARE TO HAVE COMPLETE PRICING DRAWINGS, CONTRACTOR BUY-IN USING DESIGN/BUILD AND DILIGENT REVIEWS OF EVERY CHANGE ORDER.

DOCUMENT CONTROL: THERE ARE MANY SOPHISTICATED PROGRAMS THAT WE USE AND WOULD EXPECT OUR CONTRACTORS TO USE, SUCH AS PROCORE (used on our County of Riverside libraries), BLUEBEAM (used on our University of California projects) and STORAGE PROGRAMS LIKE DROPBOX, BOX.COM AND ONE DRIVE.

## DESCRIPTION OF EXPERIENCE IN SIMILAR PROJECTS

RELEVANT EXPERIENCE IN FIRE STATIONS OR BUILDINGS WITH OFFICE AND WAREHOUSE LAYOUTS:

Henkel Corporation. Office, warehouse and labs

Vyaire Medical. Office, high-pile warehouse and labs

Institute for Defense Analyses. Gov't offices, warehouse

Southern Calif Coastal Water and Research Project: Office, warehouse and labs

Kia Motors Headquarters and Car Testing: Office, warehouse and auto repair

Kia Motors Car Dealerships and Auto Repair: 260 facilities over a 4-year period

ASICS Headquarters: Office, warehouse and gym facilities

Masimo Corporation: Office and warehouse

Meggitt Defense Systems: Office and warehouse

PROVIDE THREE EXAMPLES OF PROJECTS DENNIS POTTS OVERSAW THAT WERE ON BUDGET AND SCHEDULE

Alliant Insurance Services, New York.

Brandman University, Fairfield.

University of California at Irvine, Irvine.

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# Response to City of Ketchum Request for Proposal

**DPPM**  
PROJECT MANAGEMENT

## SUMMARY

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### EXAMPLES OF WORK AND REFERENCES MANAGED BY DENNIS POTTS (MINIMUM OF 3)

1. Alliant Insurance Services, 101 Park Ave, New York. 76,000 sf over three floors in a complicated, union controlled high rise. Two move-in dates and 400 employees. Reference is Chris Ruzic on attached sheet.
2. ISTA Pharmaceuticals, 80 Technology Drive, Irvine. Relocated to a new building. Included corporate headquarters office, wet R&D pharmaceutical testing labs and warehouse. Reference is Rich Nichols on attached sheet.
3. Brandman University. Managed over twenty campuses in Washington and California over an eighteen-year period. Reference is Jay Warner on attached sheet.

### PRICE PROPOSAL

SUBMITTED IN SEPARATE ENVELOPE PER THE ADDENDUM #1.

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**DPPM**  
PROJECT MANAGEMENT

## Company Profile

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DPPM Project Management

### COMPANY BACKGROUND

Dennis Potts founded Dennis Potts Project Management, LLC in 2009 after 26 years in the architecture, construction and project management industries. DPPM is an award-winning full-service project management firm with headquarters in Ketchum, Idaho. We advise our clients through all phases of their project, from pre-transactional strategic planning through construction and move in to their new



Henkel Corporation

facility. Our team of project management professionals brings a wide range of expertise and experience in architecture, construction and real estate to work for you.



### PHILOSOPHY

DPPM was founded on the belief that our clients' needs are of the utmost importance. Our entire team is committed to meeting those needs. As a result, a high percentage of our business is from repeat clients and referrals. We are strategically and purposefully not exclusively "aligned" with any real estate or development professionals or vendors or suppliers, which allows us to represent our client and their real estate team in a fully unbiased manner on each project.

"Experience with Proven Results"

Ketchum | Newport Beach | Los Angeles | Atlanta | New York | Chicago



## Company Profile

**DPPM**  
PROJECT MANAGEMENT

### VALUE - PROVEN RESULTS

DPPM project managers, through proven results, have created systems and processes for achieving and measuring value for our clients.

We evaluate all service providers' qualifications and proposals and negotiate win/win contracts that allow the new team members to deliver above par service for a market based competitive price.



This excellent service is achieved two ways; through both our regional and national network of vendor relationships we are able to utilize purchasing power and by integrating our project managers fully into the service provider's scope we are able to eliminate unnecessary actions from the scope and share in some responsibilities with the service provider.

**All of DPPM senior project managers have over 20 years of experience and through that experience we are able to implement "Best Practices" to each and every project. Through change order management we drive savings in both time and costs on all of our projects.**



"Experience with Proven Results"

Ketchum | Newport Beach | Los Angeles | Atlanta | New York | Chicago





**DPPM**  
PROJECT MANAGEMENT

# Services

## DPPM Project Management

At DPPM we offer a menu of both Pre Real Estate Transaction services and Post Real Estate Transaction services. By fully integrating our services into your transaction process, we believe clients will achieve greater savings and make better long-term real estate choices.

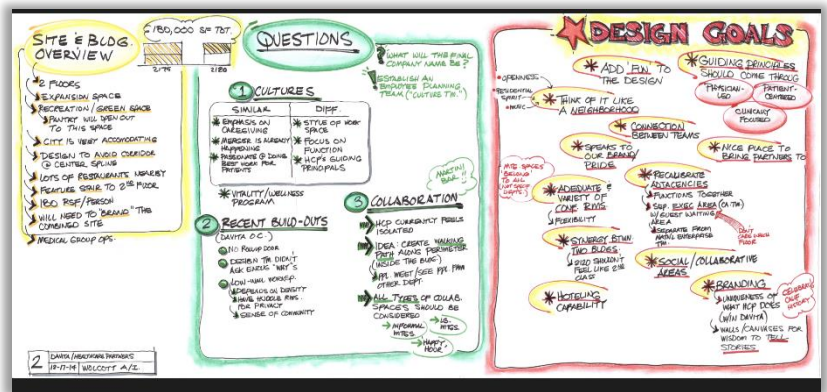
### PRE-TRANSACTION SERVICES

- Due Diligence
- Environmental Analysis
- Work Letter Analysis
- Computer-Aided Facility Management (CAFM)
- Emergency Preparedness plans
- Strategic Planning
- Programming, Visioning
- Building Systems Analysis
- Scenario Modelling
- Shipping Logistics
- Budget and Schedule Development
- Team Selection
- Contract Management

Chart	Name	Units	Rate	Estimate	Approved Budget	Approved Change Orders	Current Plus Change Orders	Summary	Comments
<b>PROJECT COSTS SUMMARY</b>									
1	Land or Building Purchase			\$ -	\$ -	\$ -	\$ -		
2	Construction			\$ 247,500	\$ 247,500	\$ -	\$ 247,500		
3	Sub-total Projected Project Cost			\$ 247,500	\$ 247,500	\$ -	\$ 247,500		
4	Contingency			\$ 11,381	\$ 11,381	\$ -	\$ 11,381		
5	Sub-total Projected Project Cost			\$ 258,881	\$ 258,881	\$ -	\$ 258,881		
6	Land or Building Purchase			\$ -	\$ -	\$ -	\$ -		
7	Construction			\$ 380,585	\$ 380,585	\$ -	\$ 380,585		
8	Sub-total Projected Project Cost			\$ 380,585	\$ 380,585	\$ -	\$ 380,585		
9	Contingency			\$ -	\$ -	\$ -	\$ -		
10	Sub-total Projected Project Cost			\$ 380,585	\$ 380,585	\$ -	\$ 380,585		

### IMPLEMENTATION SERVICES

- Architectural Design Management
- LEED® Certification
- Hazardous Material/Demolition
- Construction management
- Value Engineering
- Equipment, Specialized Machinery and FF&E Procurement and Disposition
- Telecommunications Planning
- Computer Systems/Network Planning



### POST PROJECT SERVICES


- Facility Decommissioning
- Relocation Management
- Facilities Management
- Site Remediation

Task Name	Start	End	Duration	Predecessors
1.00 - PROJECT START	10/1/2010	10/1/2010	1	
1.01 - PROJECT INITIATION	10/1/2010	10/1/2010	1	
1.02 - PROJECT PLANNING	10/1/2010	10/1/2010	1	
1.03 - PROJECT EXECUTION	10/1/2010	10/1/2010	1	
1.04 - PROJECT CLOSURE	10/1/2010	10/1/2010	1	


“Experience with Proven Results”

# DPPM Project Management


U.S. Team



Steve Mandic  
*CAFM and EP  
INational*



Terri Mihalovich-Gerstner  
*Controller  
National*



Dennis Potts  
*President  
Ketchum based*

**CENTRAL REGION**



Cary Goldberg  
*Chicago based*



R.J. Brennan  
*Chicago based*



Dennis Zoladz  
*Indiana based*

**CENTRAL**



Chris Kontour  
*Cleveland based*

**WESTERN REGION**



Matt Watson  
*Boise based*



Lisa Stumm  
*National*

**EASTERN REGION**




John Johnson  
*New Jersey based*




Erika Irby  
*New Jersey based*


**WESTERN REGION –DENVER / LOS ANGELES**



Rocco Oriando  
*Denver based*



Jennifer Hollis  
*Los Angeles based*




Pat Turley  
*Los Angeles based*

**SOUTHERN REGION**




Richard Brakewood  
*Atlanta based*


**WESTERN REGION – ORANGE COUNTY**




Russ McDaniel  
*OC based*




Fabrizio Villalobos  
*OC based*



Jim Carr  
*OC based*



Craig Siqueland  
*OC based*




Robyn Fiene  
*OC based*

**WESTERN**



Drew Goodman  
*Phoenix based*

**SOUTHERN**

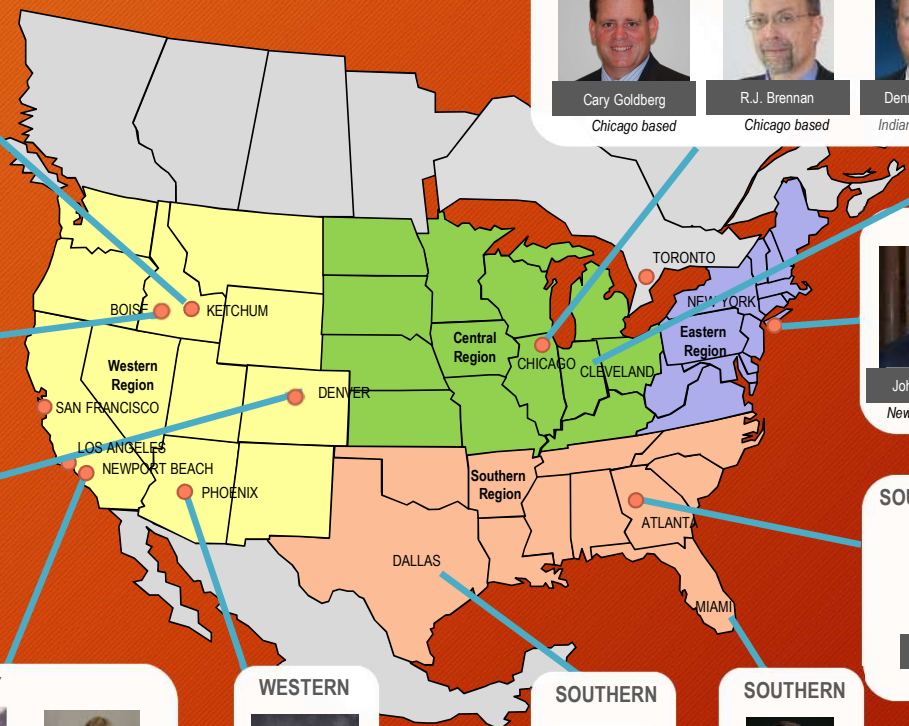


David Stack  
*Dallas based*

**SOUTHERN**



John Clement  
*Miami based*



● INDICATES DPPM OFFICE



# Project Team for Ketchum Fire Station



Dennis  
Potts

PRINCIPAL -  
PRIMARY  
CONTACT



Russ  
McDaniel

SHELL AND CORE  
SPECIALIST



Cary  
Goldberg

SENIOR  
PROJECT  
MANAGER



Matt  
Watson

IDAHO  
SPECIALIST –  
FIELD VISITS



Terri  
Mihalovich-  
Gerstner

FINANCIAL  
SUPPORT



## Dennis Potts

President, Project Manager

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## PROFESSIONAL PROFILE

### CLIENTS REPRESENTED

- Adelphia / Time Warner
- Advanced BioHealing
- Alliance Space Systems
- ASICS America
- AutoGravity
- BlueCava
- Brandman/Chapman University
- CalOptima
- CalSurance
- Carbine Studios
- Church of Scientology, Intl
- DaVita HealthcarePartners
- Dynasty Financial/Corient
- E! Entertainment
- Emulex Corporation
- Endologix
- Ericsson
- Friedman, Billings, Ramsey
- Henkel Corporation
- In-N-Out Burger
- Institute for Defense Analyses
- International Rectifier/Infineon
- Ista Pharmaceuticals/Smith Nephew
- K&L Gates
- Kia Motors America
- LAWA (Los Angeles World Airports)
- Lower My Bills / Experian
- Maersk
- Masimo Corporation
- Meggitt Sensing Systems
- Nixon Peabody
- Rauxa Advertising
- The Rodman Group
- SCCWRP
- Steinberg and Moorad
- Sybron Dental / Danaher
- Turtle Rock Studios
- UCI
- Vyaire Medical
- Westwood Studios / EA

Dennis Potts founded DPPM after 26 years in the architecture, construction and project management industry. Mr. Potts' project focus is on national multi-site, build-to-suit and tenant improvements. His pre-transaction focus is on strategic due diligence, growth projections and site selection. Post transaction, he provides risk management, project management and construction management.

Mr. Potts has recently been the principal on the Los Angeles World Airports (LAWA) relocation from LAX to Century Blvd and an owner's advisor to Kia Motors America on their national dealership renovation program. He was the primary manager for CalOptima on their 125,000 sf 7-floor HQ relocation in Orange and their 40,000 sf expansion, Henkel Corp's 77,000 sf lab and HQ relocation, ISTA Pharmaceutical's 60,500 sf relocation and Chapman University's 18 campus re-branding to Brandman University plus recent sites in Portland, Palmdale and Roseville.

Up until 2009 Mr. Potts was Executive Vice President of Project & Development Services for the Orange County and Los Angeles offices of Jones Lang LaSalle. Prior to Jones Lang LaSalle's acquisition of The Staubach Company, Mr. Potts was the Principal of Design and Construction Consulting Services for Staubach's Orange County/Nevada/Utah office. He was previously Managing Director of Studley's project management services and Senior Associate/Project Director at Gensler.

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Due Diligence • Entitlements • Architectural & Engineering Management • Environmental/CEQA • Work Letter Evaluation • LEED Certification • Core & Shell Management • Process Analysis and Engineering • Construction Management • Tenant Improvements • Industry Based Expertise • Risk Analysis • Budget Estimating • Cost Controls

## REPRESENTATIVE PROJECT EXPERIENCE

### PROFESSIONAL ACCREDITATIONS and AWARDS

- California Real Estate Sales license
- California Architectural license
- Member of CoreNet Global (past president of Southern California Chapter)
- 2009 BOMA Orange County Building of the Year for Kia Motors North American HQ
- 2006 IIDA Caliber Award for Best Design on a Limited Budget for Studley office
- 2005 Pillars of the Industry Award for KTG Y - Best Student Housing Apartment Community (Award Winner - National Level)
- 2005 Gold Nugget Awards for KTG Y - Best Low Rise Apartment Project 1-3 stories (Merit Award) and Best Community Site Plan 15-99 AC (Merit Award)
- 2003 Gold Nugget Awards for KTG Y - Best On-The-Boards Site Plan (Grand Award)

- **LAWA Relocation - Phase 1, Los Angeles, CA:** Senior PM for the Phase 1 the relocation of approximately 80,000 USF of administrative offices on-site at LAX to locations off-site to make way for the automated people mover project. The relocation impacts multiple LAWA divisions, including its existing 100 fixed-seat board room. Responsibilities include design team management, overall project management, contractor and vendor procurement/coordination, construction management and move management for the multi-phase program.
- **Kia Gallery and Core Branding renovations:** Managing a national roll-out of 265 dealerships through four DPPM offices. Services include program management set-up and visiting every site numerous times to ensure brand compliance to exhibit Kia's new lines of luxury vehicles. On-going.
- **Henkel Corporation:** Project Management for site selection through construction. Involved in lease analysis, test fits, and budget preparation. Led the bidding and selection of architects, contractors, cabling subs and movers. Project is 77,000 sf and a project budget of \$7,000,000.
- **Advanced BioHealing:** \$3.7M wet lab renovation project. This is an on-site relocation and renovation of their Torrey Pines lab complex. Project involves clean rooms, refrigerated storage and chemical classification. Total project is 70,000 sf and will be constructed in phases
- **University of California at Irvine - Vista Del Campo:** Owner's advisor for all four phases of this student housing project. Primarily wood frame construction some of the structures are four stories tall and elevator-served. Total square footage is 3.8M sf and houses 6,000 students. The third phase received LEED-NC Gold Certification. Received Gold Nugget awards from the Pacific Coast Builders Conference, including a national Grand award. Phase Four is scheduled to be completed August 2019.
- **ISTA Pharmaceuticals:** A client since 2002, ISTA has expanded four times at their initial site and most recently we completed a 60,500 sf lab and headquarters office relocation. Services included project management, site selection, vendor selection and procurement.
- **Chapman University and Brandman University:** Project management for all campuses outside of the main Chapman (Orange) campus. Sites managed since 2001 have included Washington and California locations. For the recent conversion to Brandman University we combined talents with VenturePoint Development and managed the installation of new exterior signage at 18 locations in three months.
- **Church of Scientology:** Coordinated and managed numerous sites around the world. Selecting and hiring local project managers in Rome, Brussels, Melbourne, Sydney, Johannesburg, Durban, Harare and Bulawayo. Managed the Nashville and Dallas sites. Perform due diligence and site reviews in Harlem, Inglewood, South Central LA and Hemet.
- **Kia Motors Headquarters:** Managed the site selection, design and construction of the 235,000 sf headquarters building in Irvine. The project's overall budget was \$40.5M and included marketing center, automotive repair training center and executive offices. The building and it's designers (SOM/SF) won the 2009 BOMA Building of the Year for Orange County.

Note: Some projects are representative of those completed by Mr. Potts at DPPM and while at previous firms.

### EDUCATION

- Bachelor of Architecture with honors, California Polytechnic State University, San Luis Obispo

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## Cary Goldberg

Senior Project Manager

DPPM Project Management

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**DPPM**  
PROJECT MANAGEMENT

www.DPPMLLC.com

## PROFESSIONAL PROFILE

### CLIENTS REPRESENTED

- XPO Logistics, Inc.
- Modagraphics, Inc.
- Midway Airlines, Inc.
- Smalley Construction Company
- Micro Med Machining
- The DeVILBISS COMPANY
- Lockheed Electronics., Inc.
- Zipatone, Inc.
- Curtis-Wright/Marquette, Inc.
- ITT SWF Auto-Electric
- AIRFOIL TEXTRON
- AERO MED, Inc.
- THE HERMAN Corporation
- Stryker Machine Products Company
- Barber-Colman Machine Tool
- Van Dresser Industries
- Globe Illumination
- Melfore Machine Company
- Cooperative Roofing & Siding
- Acumeter Laboratories, Inc.
- Clearing International, Inc.
- Valentec-Kisko
- Waste Controls Corp.
- Turbine Engine Components Textron
- R&D Machine Tool, Inc.
- Beaman Corporation
- Brock Telecom LTD. - Ontario, Canada
- Ozalid
- J. Lynmar Mfg. Inc.
- Qualico Metal Fab, Ltd. - Quebec, Canada
- Metal Stud Corp.
- R&M Metal, Inc. - Quebec, Canada
- C.C.I. Division of Magna Canada - Ontario Canada
- Towne Robinson Fastener Corp.
- Fordees Manufacturing Co.
- Blaw Knox Corporation
- Portable Elevator

Cary Goldberg utilizes 30 years of experience in diversified leadership roles including senior operations leadership, project management, construction management, facility management, quality systems management, asset management, environmental health & safety and turn around and workout services to provide effective project management and construction management services.

Mr. Goldberg recently led the global real estate program for Vyair Medical Inc., a multinational medical device manufacturer. This role included the oversight of 40+ facilities on five continents. In this role Mr. Goldberg managed construction projects in the United States for office and industrial spaces in excess of 270,000 sf. In addition, he managed construction and relocation projects internationally including a 50,000 sf international headquarters facility buildout and relocation in the United Kingdom.

From 1993 to 2013 Mr. Goldberg led facility management and construction for Accellent Inc. a multinational medical device manufacturer. This role included facility acquisition, management and construction. Projects during his tenure included construction of the company's corporate headquarters in Massachusetts, construction of four industrial facilities in Chicago totalling 150,000 sf, the Greenfield construction of a 50,000 sf industrial/office facility in Penang, Malaysia, the relocation of 4 business units and 5 major facility sunset projects. Mr. Goldberg received the company's "President's award for Excellence" for his service.

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**Matthew D.M. Watson, Ph.D, PMP**  
Project Manager  
DPPM Project Management •  
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**DPPM**  
PROJECT MANAGEMENT

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## PROFESSIONAL PROFILE

### CLIENTS REPRESENTED

- Auto-Trader
- Bechtel Corporation
- Cox Automotive
- Hewlett Packard Enterprise
- HP Inc.
- Idaho Central District Health
- Kelly Blue Book
- Mark Monitor
- Scentsy
- State of Idaho Health & Welfare
- United States Air Force

Matthew D.M. Watson, Ph.D., PMP, is the founder and Principal of 9m, an innovation consulting firm based in Boise, Idaho. He began his career in the United States Air Force as a forward-air-controller, serving in the invasion of Iraq with the 101<sup>st</sup> Airborne Division. Following Matt's service, he worked with the Bechtel Corporation as an organizational development project manager and training director then later with Hewlett-Packard as a business strategy project manager.

He obtained his Bachelor of Arts in Organizational Leadership from Chapman University and Master of Arts in Learning Technologies from Pepperdine University. After spending the first half of his career specializing in organizational development, project management, and lean process improvements, Matt focused his craft on the creative and innovation processes while completing his Ph.D. in Global Leadership and Change at Pepperdine University. There he was able to refine his innovation go to market model while completing his research on the enablement of creativity.

Matt not only has over 20-years of Project Management experience, he has also taught project management extensively throughout corporate environment. In addition, he is the author of "From Global Vision to Agile Execution: A Proposed Planning Model," "Fear and Loathing in the Accountable Culture," "Common Strategies and Practices among Facilitators of Innovative Thinking in Organizations," and "The Leadership That Facilitates Innovation."

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## REPRESENTATIVE PROJECT EXPERIENCE

### PROFESSIONAL ACCREDITATIONS and AWARDS

- Certified Project Management Professional (PMP)
- Certified Scrum Master
- Certified Lean / Six-Sigma Black Belt
- MBTI Qualified Administrator
- Awarded U.S. Army Commendation Medal for detailed coordination, planning, and combat supervision during Operation Iraqi Freedom
- Awarded U.S. Air Force Commendation Medal for project management of the creation of the local standards and evaluation training program

- **Logistics Vendor Project** - Senior PM for the transition to a new North American logistics provider for HP Inc. resulting in the opening of 5 additional warehouses and a reduction of \$2.6M in annual shipping costs.
- **Consumer Sales Elimination** - Senior PM for the strategic planning and change management to outsource the consumer sales process to an offshore third-party provider to enable investment in small to medium business sales resulting in an annual \$250K cost savings and \$45M revenue increase for HP, Inc.
- **Telecom Upgrade** - Senior PM for the company wide transition from a landline telecom infrastructure to a VOIP telecom provider. Converted over 300 globally based HP Inc. call centers.
- **Small-to-Medium Business Inbound Sales Project** - Senior PM for the evaluation and implementation of inbound sales via call center, affiliate, and chat acquisitions resulting in an incremental \$65M annually for Hewlett Packard
- **Learning Management System** - Senior PM for the implementation of the \$1.6M Training Partners Software designed to implement a learning management system onto a SCORM compliant platform.
- **Training Facility Upgrade** - Senior PM that retrofitted the practical training area overhauling 10,000 square feet of space for Bechtel.
- Executed the \$2.2M **Attrition Mitigation Project** consisting of leading an executive level response plan to drive organizational attrition levels from 13% down to 3% at Bechtel.
- **Note:** Some projects are representative of those completed by Dr. Watson at DPPM and while at previous firms.

### EDUCATION

- Doctor of Philosophy, Global Leadership and Change, Pepperdine University, Malibu, California
- Master of Arts Learning Technologies, Pepperdine University, Malibu, California
- Bachelor of Arts Organizational Development, Chapman University, Orange, California



**Rocco Orlando**  
 Project Manager  
 DPPM Project Management  
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 rorlando@dppmllc.com



## PROFESSIONAL PROFILE

[www.DPPM LLC.com](http://www.DPPM LLC.com)

### CLIENTS REPRESENTED

- Kia Motors America  
200+ Dealers (West/North East/Midwest/North East Regions)
- DaVita Healthcare Partners, Irvine. 70,000 sf
- Nixon Peabody Law Firm  
One Cal Plaza 3 Floors
- Brandman University, Palmdale. 9,500 sf
- Brandman University, Roseville. 10,500 sf
- Brandman University, Portland. 15,000 sf
- Modern Health, Garden Grove. 15,000 sf
- Rauxa Advertising, Costa Mesa. 12,000 sf
- Rally Sport, Boulder, CO 30,000 sf
- Apex Coaching 5,000 sf
- Power House Cycling Studio 2000 sf
- Orlando Investments, Breckenridge, CO 5200 sf

**United States Army:** Ten years as an officer in the United States Army, including two combat tours in Afghanistan, Rocco brings exceptional leadership and team building skills. With a proven track record in managing a wide range of personnel in a task oriented, time-restricted environment, Rocco brings a strong and focused work ethic to any team.

**Kia Motors America:** Project Lead for Kia’s Electronic Vehicle Rollout 2015 to over 200 dealers across the country. The project included the installation of Level II and Level III DC Fast Chargers at all participating dealers. The DC fast chargers can charge a vehicle in 15 minutes, requiring a tremendous power infrastructure to be retrofit into current dealerships. Rocco kept each dealer on track with their city planning and permitting, the bidding of construction and finally the approval and signoff from Kia headquarters.

#### DaVita HealthCare Partners:

Project Co-Lead for DaVita’s relocation to El Segundo, CA after the purchase of HealthCare Partners. Rocco was responsible for the architect and general contractor bidding, the lead in weekly construction meetings, as well as the on-site evaluations of construction progress for DaVita.

#### Brandman University:

Project manager for the construction and relocation of Brandman’s Palmdale, Portland and Roseville campuses. Services included overseeing the architectural process, general contractor bidding and selection as well as the oversight of construction including weekly meetings. Rocco negotiated a favourable revision to the City-approved signage program, as well as the bidding of technology installation. Acted as DPPM’s field representative during the construction phase.

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## CLIENTS REPRESENTED

- Kia Motors America  
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One Cal Plaza 3 Floors
- Brandman University,  
Palmdale. 9,500 sf
- Brandman University,  
Roseville. 10,500 sf
- Brandman University, Portland.  
15,000 sf
- Modern Health, Garden Grove.  
15,000 sf
- Rauxa Advertising, Costa Mesa.  
12,000 sf
- Rally Sport, Boulder, CO  
30,000 sf
- Apex Coaching  
5,000 sf
- Power House Cycling Studio  
2000 sf
- Orlando Investments,  
Breckenridge, CO  
5200 sf

## Nixon Peabody Law Firm

Project Co-Lead for Nixon Peabody's \$35M relocation to the top 3 Floors of One California Plaza in downtown Los Angeles. Rocco was responsible for the general contractor bidding as well as running the weekly meetings, along with working with the One Cal Plaza managerial team and coordinating the construction logistics for one of the busiest properties in Los Angeles. This project won multiple awards including AIA Diamond as well as being the centerpiece for several architectural publications.

## Orlando Investment Properties, Breckenridge, CO:

Property development, with a "studs out" rehab project in the heart of the Breckenridge Ski Resort. Rocco effectively conducted market research before purchasing the property with the greatest upside and security. He led the remodel of the 5,200 sq ft project, starting with his ideas and the implementation of his design intent. Project included competitively bidding the general contractor and architect, and the daily oversight of the construction. Rocco sold the development at a profit, even considering the stringent requirement to exclusively use local labor from the summit country region.

## Education

Bachelor of Science, Business Administration - Pepperdine University, Malibu, CA

## Achievements

Ranger School Graduate 2010

Army Airborne Paratrooper

Army Bronze Star OEF X

Completion of SF "Q Course" and Assignment to 1<sup>st</sup> BTL 10<sup>th</sup> Group Special Forces





**Russ McDaniel**  
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**DPPM**  
 PROJECT MANAGEMENT

## PROFESSIONAL PROFILE

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### CLIENTS REPRESENTED

- Arden Realty
- Art Center College of Design
- ASICS America
- AT&T
- Bacara Resort & Spa
- Beverly Hills Hotel & Spa
- BMW
- CBS
- Children's Hospital Los Angeles
- Cipriani Hotels
- E! Networks Studios
- Fox Entertainment Group
- Gensler
- Glen-Glenn Studios
- Greystone Communications
- Hilton Hotels
- IMAX Corp.
- International Rectifier
- Kia Motors America
- Kings / Lakers
- KTLA
- LAUSD
- Liberty Livewire Corp.
- Lockheed / Martin
- Los Angeles Dodgers
- Los Angeles World Airports
- Maguire Thomas Partners
- Masimo Corporation
- Malibu Beach Inn
- Meggitt Sensing Systems
- Newport Orthopedic Institute
- Norton Simon Museum
- Pepperdine University
- Pizza Hut/KFC/Taco Bell
- Regent Beverly Wilshire
- Sony Pictures Entertainment
- So. Cal. Gas Co.
- Toyota Motor Sales
- The Walt Disney Co.
- UCLA and USC
- Verizon
- Virgin Atlantic Airlines
- Warner Brothers
- WD Medical Office Building

Russ McDaniel joined DPPM in 2011, adding significant depth to its high-rise, design-build and construction expertise with over 25 years of solutions-driven, turn-key Project Management services to an extensive list of industries and clients. His expertise proves valuable to securing projects and adding such specialties as value engineering, design-build and innovative construction solutions. Mr. McDaniel maintains a hands-on, focused approach with each of his clients, and his estimating background is invaluable for developing and maintaining precise and complete program budgets.

In 2009 Mr. McDaniel co-founded RMSCM with partners to provide comprehensive project management services in both public and private market sectors. Prior to starting RMSCM, Mr. McDaniel was a partner for eleven years in The RMS Group, Inc. and for five years as a partner in Tectonics Construction, Inc.

Prior to working with Tectonics, Mr. McDaniel spent over five years as a Project Manager for Turner Construction Company. Mr. McDaniel's responsibilities consisted of project management, project engineering, project superintendent, marketing, and estimating. He developed his expertise on projects including high-end tenant improvements, theatre and studio renovations, post-production facilities, office buildings and high-tech specialty build-outs ranging in size from \$450,000 to over \$35,000,000.

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## REPRESENTATIVE PROJECT EXPERIENCE

- California Licensed General Contractor, California, Nevada, Arizona.
- Member of Construction Management Association of America (CMAA)
- Member, Newport Beach Chamber of Commerce
- 2009 and 2010 LABC Architectural Award winner in Sustainability for both Concept and Completed Project - Camp Emerald Bay - Boy Scout Eco Cabin
- 2006 LABC Architectural Awards for Community Impact and Sustainability, Ashes & Snow Nomadic Museum
- **Kia Motors America.** PMO services to represent the Western Region and all Gallery Projects in the region. Co-led the Program Management portion of the Program as well.
- **Bob Smith BMW in Calabasas.** Managed the construction of a 62,000 sf building with parking on the roof deck on a 5-acre lot. Dealership included 12 service bays and a Ground up 2 story building. Built in 2004
- **Ashes and Snow:** Program Director for a 56,000 square foot Nomadic Museum using a “green” building design constructed of empty railroad shipping containers. The design included a custom extruded aluminum/tent roof structure and used sustainable materials, shipping containers, cardboard Sono tubes, re-claimed wood, local gravel and sands to create a temporary museum structure. The project and The RMS Group won several awards for the design and build.
- **Bacara Resort and Spa:** Program Director for renovation of an exclusive California resort and spa. The project included room renovations and complete building skin replacement, completed while the resort remained open. Work was completed without disturbance or inconvenience to guests or staff. All spa facilities and two (2) pools were upgraded. Work included demolition, waterproofing, restaurant facilities, health center facilities, guest rooms, door and window replacement.
- **Pizza Hut / KFC / Taco Bell:** Multi-site roll out program that included new construction and renovations for over 80 retail site in the Western US.
- **Liberty Livewire Corporation:** 20,000 sf of tenant improvements. This is the corporate headquarters located in Santa Monica. The project consisted of core and shell improvements, high-end millwork, custom carpet, doors, frames and glass. Comparable to a high-end law firm space.
- **Sony Pictures Entertainment:** Construction of multiple projects on and off lot in Culver City including a ground-up 3-story post-production building, executive offices and film-specific facilities such as Spiderman post-production administration offices. Implemented the first-ever design build delivery for Sony, which include a \$4-million multi-project package for multiple end-users.
- **AT&T Customer Service Center:** 52,000 sf tenant improvement in a downtown Los Angeles office building. The project consisted of 2 full floors of corporate office space that was completed in 12 weeks. The floors were turned over to the owner in phases to allow them to install their equipment. Los Angeles, CA
- **Newport Orthopedic Institute (NOI):** General Contractor for new 44,000 square foot orthopedic medical offices and outpatient surgery center, featuring four state-of-the art operating rooms, pre-op and post-op patient areas and complete sterilization facility. The medical office facility includes 35 exam rooms, two GE X-Ray suites, a GE MRI suite and a PT center.
- **Lockheed / Martin:** 125,000 sf tilt-up building and full build-out for research and development facility at the Palmdale, California facility. Project was fast-tracked for completion in 8½ months following contract award.
- **Sony TCSOB:** General Contractor for construction of new 27,118 sf building for animation and production space - building is located on an operating campus, which requires extensive coordination with the tenants and surrounding neighbors. Culver City, California.

Note: Some projects are representative of those completed by Mr. McDaniel while at previous firms

## EDUCATION

- Bachelor of Science, Colorado State University, Ft. Collins, CO



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## Terri Mihalovich-Gerstner

Financial Controller

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PROJECT MANAGEMENT

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## PROFESSIONAL PROFILE

### INDUSTRIES

- Agriculture
- Apparel & Jewelry
- Automotive
- Construction
- Financial Services
- Health Care
- Hospitality
- Manufacturing & Distribution
- Not-for-Profit Organizations
- Professional & Business Services
- Real Estate
- Technology & Life Sciences
- Veterinary Services
- Wealth Services

### ENTITIES

- Corporations
- Estates and Trusts
- Individuals
- Limited Liability Company
- Limited Liability Partnership
- Not-for-Profit
- Partnerships

### CONSULTING SERVICES

- Business Consulting
- Due Diligence Services
- Forensic Accounting & Investigative Services
- Mergers & Acquisitions
- Research Services
- Software Selection & Implementation
- Strategic Business Planning
- Succession & Transition
- Valuation Services

Terri is an extremely knowledgeable and experienced Financial Controller, with over 25 years of demonstrated excellence in providing first-rate accounting services. As Founder & Owner of Mihalovich-Gerstner Accounting & Bookkeeping Service, Terri has provided support for several clients, first in the Tucson, AZ area where the business originated, and then Southern California when the company was successfully relocated in 1996. Terri has worked for DPPM since its inception in 2009. With a public accounting firm background, Terri has the expertise and knowledge to provide the client's attorney, certified public accountant (CPA) or certified financial planner (CFP) with the proper documentation to facilitate their financial advisement, tax planning and tax preparation efforts. She has played a pivotal role during the merger and acquisition activities of two different U.S. based businesses partnering with Global companies. Additionally, Terri has helped several companies gain control over their accounting systems and financial situations, clearing up process bottlenecks and procedural errors along the way, while implementing organized and detailed methods for maintaining institutional control and management oversight.

Terri's high quality of work and impressive attention to detail, have made her a valued asset for numerous businesses and high net worth individuals. She regularly makes it a point to be very responsive to each client's situation, and tailor an individual program that best addresses the client's specific needs as it relates to job tasks, work schedules, location (offsite in her offices or in the client's office), and any other unique client requirements. Consequently, Terri's clients are assured of receiving the kind of specialized service and support that will clearly achieve their goals and objectives in a timely manner, which in turn has promoted very long-term and highly successful working relationships.

*"I take great pride in providing accurate and timely financials on every project.*

*Detailed bookkeeping is critical on single 10,000 sf office projects to 220 site automobile dealer upgrades. Working directly with our Clients' accounting staff provides our team a clean and direct budgeting and invoicing process*

Due Diligence • Entitlements • Architectural & Engineering Management • Environmental/CEQA • Work Letter Evaluation • LEED Certification • Core & Shell Management • Process Analysis and Engineering • Construction Management • Tenant Improvements • Industry Based Expertise • Risk Analysis • Budget Estimating • Cost Controls



**DPPM**  
PROJECT MANAGEMENT

## Client List

### DPPM PROJECT MANAGEMENT

At DPPM our clients are our most valued resource. Listed below are clients that DPPM project managers have completed projects both at DPPM and prior to joining DPPM.

### SELECT CLIENT LIST

- Advanced BioHealing
- Alex Brown & Sons, Inc., Los Angeles
- Alliance Space Systems
- American Property Hospitality Management
- American Realty Advisors
- Anadys Pharmaceutical
- Apria
- Asher/Gould Advertising Corp. Hdqtrs., Los Angeles
- ASICS America
- A.T. Kearney, Costa Mesa
- AT&T
- Bank of America
- Bank of New York/Ohio Savings Bank
- Bechtel Corporation
- Best Life
- BNC Mortgage
- Bozell/Salvati, Montgomery, Sakoda, Costa Mesa
- Boeing
- BlueCava
- Brandman University
- Bruck and Perry (now K&L Gates)
- CalSurance
- CalOptima
- Carbine Studios
- Carrier Corporation
- Catholic Healthcare West Headquarters, Pasadena
- CBRE Investors
- CH2M Hill
- Chapman University
- Church of Scientology
- Columbia Square restaurant on Sunset
- Comerica Bank
- Continental Graphics



Los Angeles Times



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- Continental Bank - Private Banking, Los Angeles
- Cortex Pharmaceuticals
- Crespi Carmelite High School
- DaVita
- E! Entertainment
- Emulex Corporation
- Endologix
- ENVIRON
- Exult Corporation
- Ericsson
- Evangelical Christian Credit Union
- Ferruzzo and Ferruzzo
- First Interstate Bank, Brentwood
- First Interstate Bank, LaCienega Branch, Los Angeles
- FMV Opinions
- Friedman, Billings, Ramsey
- FTDS
- Gentiva Healthcare
- Henkel Corporation
- HID Global
- IEC/UEI
- Infineon
- In-N-Out Burger
- Innocean Worldwide
- Intercommunications
- International Rectifier
- Institute for Defense Analyses
- ISTA Pharmaceuticals
- J.H. Whitney & Co.
- HealthCare Partners (now DaVita)
- Home Savings of America Tower, Interior Code Renovations
- Kenwood U.S.A.
- Kerlan Jobe Orthopaedic Clinic
- Kia Motors America
- LaSalle Investment Management
- Long Beach BMW
- Main Electric Supply
- Maersk
- Masimo Corporation



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- McCarthy Construction, Newport Beach
- McDonnell Douglas Corp, San Jose
- Meggitt Defense Systems
- Merrill Lynch
  - Thousand Oaks
  - Century City
  - Rancho Santa Fe
  - National Account
- Met Life Investors, Newport Beach
- MGM Mirage Design Group
  - BRAND Steakhouse, Monte Carlo
  - Diablo's Cantina, Monte Carlo
  - Fat Bob's BBQ
  - Tangerine Night Club, Treasure Island (now closed)
  - Shintaro, Bellagio (now closed)
  - Hide
  - Yellowtail Japanese Restaurant & Lounge, Bellagio (Light Group)
- Mitsubishi Electronics
- Modern Health
- neoBrands
- Newline Cinema, Treasure Island (now closed)
- Newport Harbor Nautical Museum
- Nextel
- Nixon Peabody
- Nortel Networks
- Northern Trust Bank
- NovaCare Rehabilitation
- Old Republic Construction Programming Group
- Old Republic Title Group
- Omni West
- Oppenheimer, Wolf and Donnelly
- Option One Mortgage
- OptoSigma Corporation
- Out-Spoke-N
- People's Choice Home Loans, Inc.
- Pepperdine University
- PG&E
- Pricewaterhouse Coopers, San Diego
- Quartz



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- Quest Software
- Quest Nutrition
- Rauxa Advertising
- Rabobank
- Red 5 Studios
- Savings of America, LaSalle branch, Chicago
- SCAN Health Plan
- Secova (now Ultralink)
- Soka Gakkai International
- Source Interlink Media
- Southern California Coastal Water Research Project
- Sybron Dental
- T. Rowe Price, Tampa
- Tangram Interiors
- The Equitable, Newport Beach
- Time Warner Cable
- TPG Capital Group
- Time Warner Cable
- Toyota
- UCI Medical Center
- Union Square Investment Company
- University of California, Irvine
- United States Ski and Snowboard Association
- US Consumer Banking Group (Division of Citibank), San Francisco
- US Healthworks
- Vyaire Medical
- Washington Mutual, Newport Beach
- Wedbush Morgan Securities, Newport Beach
- Westwood Studios (now Electronic Arts)
- Whirlpool



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## By Category

### Bio Tech and Medical

- Advanced BioHealing
- Advanced Tissue Sciences - R&D with Clean Room
- Anadys Pharmaceutical - R&D
- Apria Healthcare
- Brandman Nursing School
- CalOptima PACE - Clinic
- Catholic Healthcare West
- Cortex Pharmaceuticals - Vivarium
- Endologix
- Henkel Corporation - simulated Class 10,000 Clean Room
- ISTA Pharmaceuticals (now Bausch Lomb)
- Kerlan Jobe Orthopaedic Clinic
- OptoSigma - Class 1,000 Clean room
- Sybron Dental - Clean Room
- US Healthworks - Cord Blood Bank



rau|x:a

### Educational

- Chapman University
- Brandman University
- University of California at Irvine
- Pepperdine University
- International Education Corporation/UEI Colleges



### Retail/Hospitality

- American Seating Showroom
- Bank of America branch
- Merrill Lynch retail branches
- Banana Republic, Prototype and three locations
- Beverly Hills Polo Club (Prototype)
- Bloomingdales Area Expansion
- Brooks Brothers Remodel
- Cal's Camera and Video
- Columbia Square Restaurant on Sunset
- Grand Avenue Garage/Maguire Thomas Partners, 14-story mixed use parking facility
- Homechef
- Hugo Boss

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- Internet System for Lease Tracking (CAD-PMP), Fashion Island
- Irvine Company Retail at Fashion Island
- MGM Mirage Design Group
- Mont Blanc
- Newport Harbor Nautical Museum
- Out-Spoke-N retail stores
- South Coast Plaza Mall Renovation
- Sunset Strip Plaza
- Tangram Interiors Showroom and Office
- The Arcade, reuse of 3 theaters and historic landmark
- The Gap, over 30 locations
- White Rabbit Children's Bookstore



#### Architecture

- Avian Court, Irvine
- T. Rowe Price, Tampa
- Samson the Bear Exhibit, Orange County Zoo
- Downtown West Medical Office Building
- UCI Vista del Campo, all four phases

#### High Tech Facilities

- GTech Corporation Computer Centers, Whittier & Sacramento
- Pacific Gas & Electric, Gas Control Centers and Computer Facilities

#### Law Firms

- Bruck & Perry, Newport Beach
- Clausen Miller, Newport Beach
- Feldman & Rothstein, Pasadena
- Ferruzzo and Ferruzzo, Newport Beach
- Jones Walker, New Orleans
- Knobbe, Martens, Olson and Bear
- K&L Gates, Irvine
- Landels, Ripley & Diamond, San Francisco (winner of law firm design of the year - ABA Journal)
- Mudge Rose Guthrie Alexander & Ferdon, Los Angeles
- Nixon Peabody, Los Angeles
- Oppenheimer Wolff & Donnelly, Century City
- Oppenheimer Wolff & Donnelly, Newport Beach
- Waldron & Olson, Newport Beach



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## WHAT OUR CLIENTS HAVE TO SAY

*"I enjoyed working with the DPPM Team and would welcome the opportunity to work together again in the future."*

— Michael T. Reilly, Ph.D., Vice President, Global Operations, Henkel Corporation

*"We have worked with Dennis on several projects as we have expanded our offices. His knowledge and ability to work with our team and within our budgets is extremely valuable."*

—Kathleen McGinley, Vice President HR & Corporate Services, ISTA Pharmaceuticals

*"I have known Dennis as a friend and colleague for more than ten years. In real estate, he has always impressed me with his dedication to projects and clients. His knowledge of real estate markets and real property issues is extensive."*

—Jane F. Hoffner, Managing Director, Bascom Portfolio Advisors

*"Dennis & Rob were instrumental in getting us low cost competitive bids for our space utilization project. They were instrumental in ensuring the timelines were met and provided key expertise during the bidding process."*

—Bill Moran, Facility Manager, Advanced BioHealing

*"Dennis is his client's "trusted advisor", bringing strategy and expertise to a variety of projects, from his wealth of experience stemming from both the architect's and project manager's perspective. Dennis leads his projects with patience, organization and collaborative team spirit, all with a warm demeanor and great sense of humor. I welcome any opportunity to work with him and his selected team anytime!"*

—Robyn Taylor, r.taylordesign, (project designer for Out-Spoke-n)

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## Shell and Core Experience

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West Downtown Medical Office Building – 60,000 sf steel-frame four-story building with a nine-story adjacent parking structure

Masimo Corporation – 40,000 sf new exterior construction in conjunction with 235,000 sf tenant improvement

Kia Motors Headquarters – 235,000 sf marketing center, automotive repair training center and executive offices. LEED Silver

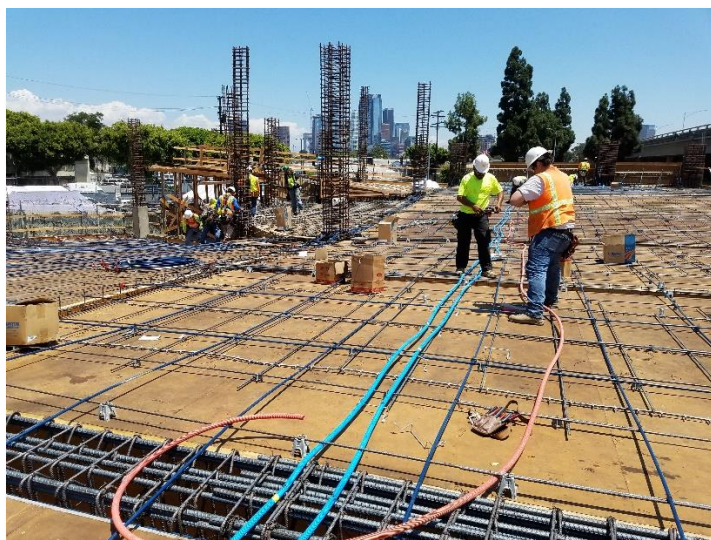
Sony – 45,000 sf ground up production building including avid rooms, edit bays and graphics facilities (digital animation) and 125,000 sf renovation of the Digital Animation studios

Fox Studios - Broadcast Facility - construction of 2 sound stages and live broadcast facilities for Fox Sports including Satellite uplink

University of California at Irvine – Vista Del Campo: Owner’s advisor for all four phases of this ground-up student housing project. Some of the structures are four stories tall and elevator-served. Total square footage is 3.8M sf and houses 6,000 students. LEED Platinum and Zero Carbon Footprint.

Vyaire Medical – 100,000 sf of office and labs. Significant processed piping and electrical distribution. LEED Silver

Lockheed / Martin: 125,000 sf tilt-up building and full build-out for research and development facility at the Palmdale, California facility. Project was fast-tracked for completion in 8½ months following contract award.



Progress photos of the “soon-to-be-completed” WDMOB and parking structure.

- - Some work above done by Dennis Potts and Russ McDaniel at previous firms

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## REFERENCES



DPPM Project Management

November 22, 2019

1. Jay Warner
  - Assistant Vice Chancellor of Real Estate and Facilities
  - Brandman University
  - 16355 Laguna Canyon Road
  - Irvine, CA 9261
  - (949) 341-9835
  - [warner@brandman.edu](mailto:warner@brandman.edu)
  - a. Project: Numerous Brandman campuses, including medical simulation labs and classrooms, in Washington and California over a twelve-year period.
2. Gary Thomas
  - Director of Facilities
  - CalOptima
  - 505 City Parkway
  - Orange, CA
  - (714) 246-8834
  - [gthomas@caloptima.org](mailto:gthomas@caloptima.org)
  - a. Projects:
    - i. three phases of office buildout totaling 180,000 sf over five years.
    - ii. CAFM (CADD sf allocation) services for on-going facility management
3. Rick Nichols, Aerie Pharmaceuticals (formerly of (Bausch and Lomb/ISTA Pharmaceuticals lab)
  - Facilities Director
  - 157 Technology
  - Irvine, CA 92618
  - (949) 788-5339
  - [rmtnichols@att.net](mailto:rmtnichols@att.net)
  - a. Project: ISTA Pharmaceuticals HQ and R&D Labs. 60,000 sf
4. Chris Ruzic
  - Global Director of Real Estate
  - Alliant Insurance Services
  - 1301 Dove St., 2<sup>nd</sup> Floor
  - Newport Beach, CA 92660

(949) 660-8171 – work

(949) 689-9116 – cell

[chris.ruzic@alliant.com](mailto:chris.ruzic@alliant.com)

a. Projects:

- i. Healthcare Partners headquarters relocation from Torrance to El Segundo. 183,000 sf. Critical move-in date of December 31, 2015.
- ii. Alliant Insurance, 101 Park Ave., floors 12, 14 and 18, New York. Critical move-in August 23, 2019 and October 14, 2019.

5. Diane Coles Levine

Former Director, Workplace Solutions

SCAN Health Plan

3800 Kilroy Airport Way

Suite 100

Long Beach, CA 90806

(562) 449-8998

[dcoleslevine@outlook.com](mailto:dcoleslevine@outlook.com)

a. Projects:

- i. ASICS Headquarters, 80,000 sf Irvine
- ii. PACE Program of All-Inclusive Care of the Elderly Center, Long Beach. 25,000 sf. OSHPD 3 Facility

6. Nicholas Stellman

COO

AutoGravity

15495 Sand Canyon Road

Irvine, CA 92618

(949) 345-5379

a. Project: AutoGravity Headquarters, 45,000 sf Irvine

# Kia Motors America



## Kia Motors America Headquarters, Irvine, CA

### Challenge:

- Manage the site selection, design and construction of the 235,000 sf headquarters building.
- Create an image consistent with Kia Motors' rapidly growing reputation of automotive design and quality.

### Strategy:

- Identify and Engage a Recognizable World-class Architect
- Utilize the large employee base to gain significant support from City economic developers
- Integrate the Kia Motors' international culture into a landmark facility

### Results:

- After an extensive search and interviews, internationally-recognized San Francisco-based SOM (Skidmore, Owings and Merrill) was hired as the lead architect.
- The scope of the project's overall budget of \$40.5M included Kia's key components of marketing center, automotive repair training center and executive offices.
- The City of Irvine's mayor, city council and economic development team actively supported the project and coordinated both a highly publicized ground-breaking and grand opening ceremonies.
- In travels to Seoul, Korea, the team determined that the key element of the "arch" was significant in the Kia Motors' culture. The arch was translated into the 50' high steel-and-glass car showroom and entry lobby connecting the two tilt-up office structures.
- For prestige and market presence, the building and its designers won the 2009 BOMA Building of the Year for Orange County among numerous other awards.

### Reference:

Cathy McCann  
CMcCann@kiausa.com  
Manager, Corporate Administration & Facilities  
(949) 468-4603  
111 Peters Canyon Road  
Irvine, CA 92606-1790

*This project was managed by Dennis Potts while at another firm.*





## County of Riverside Library, French Valley, CA

### Challenge:

- One of three libraries awarded to DPPM in 2019. Manage the design and construction of the 15,000 sf new Library building.
- Integrate McCarthy builders as the design/build partner for a zero-change order ground-up library
- Achieve LEED Gold status

### Strategy:

- Use the quantity discounts of designing all three libraries concurrently to save cost and create efficiencies for all.
- Involve County officials from the start both in design input and City and County processing, being aware that there will be three separate cities involved.

### Results:

- Project has not broken ground.
- LEED goal was identified early on and
- DPPM is enforcing the design/build contract will include the LEED consultant and any costs.

### Reference:

Steve Collins  
President, CFP  
Steve@taxfreep3.org  
Primary Client Contact  
(612) 735-7717  
18336 Minnetonka Blvd Suite C  
Deephaven, MN 55391





A

B



C



Wood Plank Edge Wood Ceiling  
P207 Tropical PM  
MDF/Black/White Coat



Wood Plank Edge Wood Ceiling  
P207 Tropical PM  
MDF/Black/White Coat



Wood Plank Edge Wood Ceiling  
P207 Tropical PM  
MDF/Black/White Coat



Color  
Solid Color Paint  
Farrow & Ball 19117



Color  
Solid Color Paint  
Benetton 02752



Color  
Solid Color Paint  
Benetton 02752



Color  
Solid Color Paint  
M&D 02000  
Capitol Gold & Gold Pine



Color  
Solid Color Paint  
M&D 02000  
White Oak/White & Oak Panels



Color  
Solid Color Paint  
M&D 02000  
White Oak/White & Oak Panels

A

B

C



COUNTY OF RIVERSIDE EDA LIBRARY SYSTEM  
FRENCH VALLEY



COUNTY OF RIVERSIDE EDA LIBRARY SYSTEM  
FRENCH VALLEY





# Charitable Giving



**DPPM**  
PROJECT MANAGEMENT

DPPM Project Management

## INTENT

*“I believe that our company is fortunate to work in a business that helps build better environments. To further that goal, DPPM has developed a charitable giving program. Our goal is to donate 25% of our net profits to charity each year.”*

*Dennis Potts, President*

## RESULTS

In 2017 we donated at least \$200.00 to each of the following:

- Juvenile Diabetes Research Foundation
- American Cancer Society – Celebration of Life Gala
- IIDA Southern California Student Scholarship Fund
- Orange County Rescue Mission
- Wayfarers Chapel
- Roosters Foundation of Orange County
- Autism Speaks Inc.
- Global Down Syndrome Foundation
- First Christian Church of Huntington Beach Youth Activities Fund
- Folds of Honor Foundation. HONOR THEIR SACRIFICE. EDUCATE THEIR LEGACY.
- ASPIRE Creative Arts Program
- Boys Hope Girls Hope of Chicago
- Laura’s House – Ending the Silence of Domestic Violence



*Newport Harbor Nautical Museum*

In 2018 we donated at least \$200.00 to each of the following:

- Adom Partnership and the Amazing Grace Preparatory School in Kumasi, Ghana.
- Crespi Carmelite High School
- WISE House, Santa Ana. Home for homeless women
- First Christian Church of Huntington Beach Youth Activities Fund
- Autism Speaks Inc.
- WISEPlace, Santa Ana, non-profit hotel for unaccompanied homeless women
- Cornell University Medical Center
- Folds of Honor Foundation. HONOR THEIR SACRIFICE. EDUCATE THEIR LEGACY.
- ASPIRE Creative Arts Program
- IFMA Foundation
- Orange County Rescue Mission

## ADDITIONAL SUGGESTIONS

We encourage our team, clients and vendors to suggest to us charities about whom they are passionate.

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**DPPM**  
PROJECT MANAGEMENT

**DPPM State of Idaho Business**

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**State of Idaho**  
Office of the Secretary of State

**CERTIFICATE OF REGISTRATION  
OF  
DENNIS POTTS PROJECT MANAGEMENT, LLC**

File Number W 207967

I, LAWRENCE DENNEY, Secretary of State of the State of Idaho, hereby certify that an application for Foreign Registration Statement, duly executed pursuant to the provisions of the Idaho Uniform Business Organization Code, has been received in this office and is found to conform to law.

ACCORDINGLY and by virtue of the authority vested in me by law, I issue this Certificate of Registration to transact business in this State and attach hereto a duplicate of the application for such certificate.

Dated: August 29, 2018

  
Lawrence Denney  
SECRETARY OF STATE

By 

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**DPPM**  
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## DPPM City of Ketchum Business



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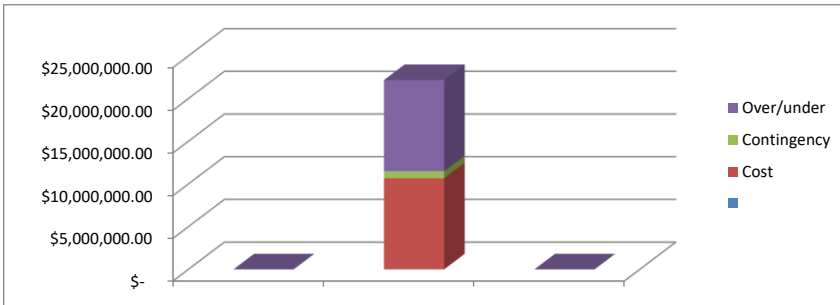
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# This is a 5 PAGE sample budget using Ketchum Proforma



OVERALL PROJECT BUDGET					
		Usable SF: 14,530			
		Rentable SF: 14,530	Original Budget v1	Updated Budget v2	Comments
Client: Ketchum Fire Station	Location: SAMPLE	v1 Budget \$/rsf	November 17, 2019	TBD	

PROJECT COSTS SUMMARY					
1	Bonds	11.08	\$ 161,000	\$ -	
2	Construction	648.29	\$ 9,419,626	\$ -	
3	Design, Engineering, and Consulting	68.07	\$ 989,115	\$ -	
4	Equipment	36.13	\$ 525,000	\$ -	
5	Technology	4.47	\$ 65,000	\$ -	
6	Furniture	12.75	\$ 185,259	\$ -	
7	Relocation Expenses	0.00	\$ -	\$ -	
8	Miscellaneous Costs	0.34	\$ 5,000	\$ -	
9	Graphics	1.03	\$ 15,000	\$ -	
<b>T1</b>	<b>Total of Items in the Master Budget</b>	<b>\$ 782.17</b>	<b>\$ 11,365,000</b>	<b>\$ -</b>	
<b>10</b>	<b>General Contingency</b>	<b>9.29</b>	<b>\$ 135,000</b>	<b>\$ -</b>	
<b>T2</b>	<b>Total of Items outside the master budget</b>	<b>\$ 9.29</b>	<b>\$ 135,000</b>	<b>\$ -</b>	
<b>30</b>	<b>Landlord Allowance (based on RSF)</b>	<b>0.00</b>	<b>\$ -</b>	<b>\$ -</b>	
<b>T3</b>	<b>TOTAL PROJECTED PROJECT COST</b>	<b>791.47</b>	<b>\$ 11,500,000</b>	<b>\$ -</b>	
<b>50</b>	<b>Remaining contingencies included above</b>	<b>57.09</b>	<b>\$ 829,572</b>	<b>\$ -</b>	



**KEY MILESTONES**

1. A/E Drawings submitted to City by Feb 1 2020
2. Budget Approval by Client
3. Start Construction by: May 2020
4. Move-in date: July 30, 2021

**CRITICAL ISSUES THIS WEEK**

- 1.
- 2.
- 3.

**CRITICAL IN ONE MONTH**

1. Submit CD's by:
- 2.
- 3.

**OVERALL PROJECT BUDGET**

		Usable SF: 14,530				
		Rentable SF: 14,530		Original Budget v1	Updated Budget v2	Comments
Client:	Ketchum Fire Station			November 17, 2019	TBD	
Location:	SAMPLE	v1 Budget \$/rsf				
<b>1</b>	<b>Bonds</b>					
100	Bond Issuance Cost	7.57	\$	110,000		
101	Construction Management (CM) Bond	3.51	\$	51,000		
	Sub-total Bonds	11.08	\$	161,000	\$ -	
	<b>Total Bonds</b>	11.08	\$	161,000	\$ -	
<b>2</b>	<b>Construction</b>					
200	General Contractor Costs	452.72	\$	6,578,034		
231	Site Work	89.76	\$	1,304,278		
232	Apparatus Bay Exhaust System	6.61	\$	96,000		
233	4 Stall Covered Parking	2.25	\$	32,684		
234	Fully Heated Exterior Concrete	4.27	\$	62,058		
235	LEED Silver Certification GC cost	9.42	\$	136,943		
236	Builders Risk	0.52	\$	7,500		
	Sub-total Construction GC	565.55	\$	8,217,497	\$ -	
253	Supplemental Site Work	11.19	\$	162,557		
	Sub-total Direct Trades not in GC	11.19	\$	162,557	\$ -	
261	Permit Fees Allowance	12.04	\$	175,000	\$ -	Allowance
262	Retention	0.00	\$	-	\$ -	
263	LEED Registration Fee	2.41	\$	35,000		
266	Owner option alternates and allowances	0.00	\$	-	\$ -	
267	Potential union labor costs	0.00	\$	-	\$ -	
280	Special Inspections	0.00	\$	-	\$ -	
290	Construction Contingency - Owner Contingency / Design Contingency 10% of Hard Construction Costs	57.09	\$	829,572	\$ -	Allowance
	Sub-total Contingencies, change orders and reimbursables	71.55	\$	1,039,572	\$ -	
	<b>Total Construction</b>	648.29	\$	9,419,626	\$ -	
<b>3</b>	<b>Design, Engineering, and Consulting</b>					
300	Architect	0.00			\$ -	
302	Main Architectural Contract	51.38	\$	746,615		
	Sub-total Design, Engineering, and Consulting	51.38	\$	746,615	\$ -	
330	Actual Reimbursables direct	0.00			\$ -	
332	Signalization Design Allowance	4.13	\$	60,000		
333	Geotech Report	0.52	\$	7,500		
334	Testing & Inspection	1.72	\$	25,000		
370	Project Management Pre-Con and Construction DPPM	3.44	\$	50,000		
371	Project Management Pre-Con and Construction DPPM	5.85	\$	85,000		
372	Building Commissioning Agent	1.03	\$	15,000		
	Sub-total Other Direct Consulting Contracts	16.69	\$	242,500	\$ -	
	Sub-total Contingencies, change orders and reimbursables		\$	-	\$ -	
	<b>Total Design, Engineering, and Consulting</b>	68.07	\$	989,115	\$ -	
<b>4</b>	<b>Equipment</b>					
400	Cafeteria Equipment	0.00			\$ -	
401	Gym Equipment	0.00			\$ -	
402	Break Room Equipment (ref, MW, coffee)	0.00			\$ -	
403	Office Equipment (Shredders, Garbage Cans)	0.00			\$ -	
404	SCBA Station w/ FF&E	5.16	\$	75,000		
405	Emergency Signalization Install of Owner Furnished Equipment	10.32	\$	150,000		
406	Signalization Equipment Supply of Emergency Signal Poles, Fla	3.44	\$	50,000		
407	Energy Efficiency Program	17.21	\$	250,000		
	Sub-total Equipment	36.13	\$	525,000	\$ -	
490	Contingency	0.00	\$	-	\$ -	
	Sub-total Contingencies, change orders and reimbursables		\$	-	\$ -	
	<b>Total Equipment</b>	36.13	\$	525,000	\$ -	
<b>5</b>	<b>Technology</b>					
500	New IT Equipment Costs	4.47	\$	65,000		
	Sub-total Technology		\$	65,000	\$ -	
590	Contingency	0.00	\$	-	\$ -	
	Sub-total Contingencies, change orders and reimbursables		\$	-	\$ -	
	<b>Total Technology</b>	4.47	\$	65,000	\$ -	

**OVERALL PROJECT BUDGET**

		Usable SF:	14,530				
		Rentable SF:	<b>14,530</b>	Original Budget	Updated Budget		
Client:	Ketchum Fire Station			v1	v2		
Location:	SAMPLE		v1 Budget \$/rsf	November 17, 2019	TBD	Comments	
<b>6 Furniture</b>							
607	Owner Furniture, Fixture & Equipment - M&L		10.42	\$	151,349		
608	CM Furniture, Fixture & Equipment Allowance	DPPM	2.33	\$	33,910		
Sub-total Furniture			12.75	\$	185,259	\$	-
650	Potential union labor costs		0.00	\$	-	\$	-
690	Contingency		0.00	\$	-	\$	-
Sub-total Contingencies, change orders and reimbursables			0.00	\$	-	\$	-
<b>Total Furniture</b>			<b>12.75</b>	<b>\$</b>	<b>185,259</b>	<b>\$</b>	<b>-</b>
<b>7 Relocation Expenses</b>							
<b>8 Miscellaneous Costs</b>							
800	Other		0.00			\$	-
801	Legal Fees	Legal	0.34	\$	5,000		
802	Prevailing Wage review	TBD	0.00			\$	-
Sub-total Miscellaneous Costs			0.34	\$	5,000	\$	-
890	Contingency		0.00			\$	-
Sub-total Contingencies, change orders and reimbursables			0.00	\$	-	\$	-
<b>Total Miscellaneous Costs</b>			<b>0.34</b>	<b>\$</b>	<b>5,000</b>	<b>\$</b>	<b>-</b>
<b>9 Graphics</b>							
900	Artwork		0.00			\$	-
901	Wall Graphics		0.00			\$	-
902	Exterior Signage		1.03	\$	15,000		
903	Interior Signage		0.00			\$	-
904	Stationery/Advertising		0.00			\$	-
Sub-total Graphics			1.03	\$	15,000	\$	-
990	Contingency		0.00	\$	-	\$	-
Sub-total Contingencies, change orders and reimbursables				\$	-	\$	-
<b>Total Graphics</b>			<b>1.03</b>	<b>\$</b>	<b>15,000</b>	<b>\$</b>	<b>-</b>
<b>10 General Contingency</b>							
1000	Misc Allowance		0.00	\$	-	\$	-
1001	Weather Condition Allowances		6.88	\$	100,000		
1002	Unsuitable Soils Allowance		2.41	\$	35,000		
1010	Overall Contingency (excl Land Purchase)		0.00	\$	-	\$	-
<b>Total General Contingency</b>			<b>9.29</b>	<b>\$</b>	<b>135,000</b>	<b>\$</b>	<b>-</b>





**DPPM**  
PROJECT MANAGEMENT

# DPPM Sample Schedule

smartsheet				shell building schedule from tom updated DPPM 10-2																							
WBS	Task Name	Duration	End Date	Dec 31				Jan 7				Jan 14															
				S	S	M	T	W	T	F	S	S	S	M	T	W	T	F	S	S	S	M	T	W	T	F	S
1	PROJECT SUMMARY	557d	12/06/19																								
2	CREATE TEAM	70d	01/24/18																								
3	Hire Development/Project Manager	20d	11/15/17																								
4	Create RFP and solicit architect and engineers	30d	12/27/17																								
5	Interview, select and contract with A/E	20d	01/24/18																								
6	CONCEPTUAL DESIGN	35d	03/14/18																								
7	Plan view of Project/Building overlayed on site plan	20d	02/21/18																								
8	Zoning level or Charette level drawing	5d	02/28/18																								
9	Organize planning charrette with County officials	10d	03/14/18																								
10	DUE DILIGENCE	111d	04/18/18																								
11	RE Transaction	36d	01/03/18																								
12	Title report	15d	12/06/17																								
13	Boundary survey	20d	01/03/18																								
14	Property taxes verified	0	11/15/17																								
15	ALTA survey complete	39d	01/30/18																								
16	Technically correct in all details and in compliance with ALTA Standards	25d	01/10/18																								
17	Detailed review of survey notes	14d	01/30/18																								
18	Review survey for easements that would interfere with development	14d	01/30/18																								
19	Environmentals	27d	03/30/18																								
20	Bio	25d	03/28/18																								
21	Phase 1 clean	10d	03/07/18																								
22	Special soils conditions identified and/or hot spots	17d	03/30/18																								
23	Soils report	36d	01/04/18																								
24	Soils report	10d	11/29/17																								
25	Letter of reliance and/or peer review	7d	12/08/17																								
26	Verify import-export quantities	14d	12/28/17																								
27	Recalc shrinkage	5d	01/04/18																								
28	Locate utility point-of-connections	40d	04/18/18																								
29	* Water District	20d	03/21/18																								
32	* Storm drain	10d	03/07/18																								
34	* Sewer	15d	03/14/18																								
35	* Locate LA DWP Power	20d	03/21/18																								
38	* Dedications	40d	04/18/18																								
41	CONSTRUCTION COST/BUDGETING	82d	03/09/18																								
42	Outline Specifications	10d	02/07/18																								
43	Building specifications approved	10d	02/07/18																								
44	On-Site Construction costs	8d	02/19/18																								
45	Detailed construction costs	8d	02/19/18																								
46	Update const costs and forecast increases to time of expenditure	4d	02/13/18																								
47	Off-Site construction costs	32d	03/09/18																								
48	Fees from serving electrical utility	3d	01/29/18																								
49	Fees from water district	5d	01/31/18																								
50	Special construction (e.g., undergrounding electrical service and structures)	17d	02/16/18																								
51	Signalization cost - if any	15d	02/14/18																								
52	Street improvement costs	17d	03/09/18																								
53	Impact Fees	14d	12/05/17																								
54	Detailed break out of impact fees	14d	12/05/17																								
55	Identify sources for all permit fees (SP, EIR, Conditions of Approval, Indiv. Depts, utilities)	10d	11/29/17																								
56	Detailed calculation of plan check and permit fees	12d	12/01/17																								
57	Consult with building and safety to determine any prospective fee increases	12d	12/01/17																								
58	Update impact fees for forecasted increases	14d	12/05/17																								
59	LAND USE ENTITLEMENTS	120d	08/15/18																								
60	Conditional Use Permit	120d	08/15/18																								
61	Zoning submittal and app	90d	07/04/18																								
62	Stamped land-use drawing	15d	07/25/18																								
63	Signed acknowledgement of acceptance of conditions	15d	08/15/18																								

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## DPPM Sample Schedule page 2

Search...		smartsheet																								
File Automation Forms		shell building schedule from tom updated DPPM 10-2																								
Gantt View Filter Arial 14 B I U S A		Σ * \$ % 9 0.00																								
WBS	Task Name	Duration	End Date	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	
64	Land use drawing matched to stamped drawing	2d	07/27/18																							
65	Environmental Impact Report	90d	07/04/18																							
66	Certified EIR - if necessary	90d	07/04/18																							
67	CEQA exemption/mitigation	20d	03/28/18																							
68	DESIGN	90d	05/30/18																							
69	A&E Construction Plans	90d	05/30/18																							
70	Prepare Construction Documents	90d	05/30/18																							
71	Grading	12d	02/09/18																							
72	Soils report submitted, reviewed and approved by City Engineer	7d	02/02/18																							
73	Import/Export quantities verified	5d	01/31/18																							
74	Precise grading plan complete	7d	02/09/18																							
75	Landscape	20d	02/21/18																							
76	Planting and irrigation plans	10d	02/07/18																							
77	Conceptual Landscape Design Plan as approved	10d	02/21/18																							
78	Civil Engineering	17d	02/16/18																							
79	Survey easements to accommodate final grading	17d	02/16/18																							
80	Survey right-of-way dedications or easements	17d	02/16/18																							
81	Engineered Street Improvements	55d	04/11/18																							
82	Street improvement plan	51d	04/05/18																							
83	Plans submitted to city	4d	04/11/18																							
84	Design approval from serving utilities (80)	41d	03/22/18																							
85	Sewer	17d	02/16/18																							
86	Storm drain	17d	02/16/18																							
87	DWP or equivalent	41d	03/22/18																							
88	Water district	17d	02/16/18																							
89	Verizon or serving telecom	17d	02/16/18																							
90	PERMITTING	189d	10/16/18																							
91	Civil Engineering	31d	03/08/18																							
92	WQMP	31d	03/08/18																							
93	Final WQMP Submittal	4d	01/30/18																							
94	Final WQMP Corrections	10d	02/13/18																							
95	Final WQMP 2nd Round Submittal	10d	02/27/18																							
96	Final WQMP Approval	7d	03/08/18																							
97	Grading	26d	03/01/18																							
98	Soils report submitted, reviewed and approved by City Engineer	7d	02/02/18																							
99	Grading plan submitted	12d	02/20/18																							
100	Grading plan approved by city	7d	03/01/18																							
101	Building and Safety	56d	08/16/18																							
102	1st Round Submittal	26d	07/05/18																							
103	Corrections	5d	07/12/18																							
104	2nd Round Submittal	14d	08/01/18																							
105	Corrections	6d	08/09/18																							
106	3rd Round Submittal (90%)	5d	08/16/18																							
107	Plan check complete	0	08/16/18																							
108	Building Permit Issuance	169d	10/16/18																							
109	Signed acknowledgement of conditions of approval	11d	08/30/18																							
110	Approved set of public improvement plans on file with City Engineer's office	5d	04/18/18																							
111	Landscape plan requirements - conditions of approval	5d	02/28/18																							
112	Precise grading plans shall be approved	5d	03/08/18																							
113	Rough grading complete	5d	10/04/18																							
114	Compaction certified	5d	10/09/18																							
115	Pad elevation certification	5d	10/12/18																							
116	Rough grading inspection signed off by City Building Inspector	5d	10/11/18																							
117	Building Permit Ready	2d	10/16/18																							
118	Grading Permit Issuance	157d	08/31/18																							
119	Precise grading plan	0	03/01/18																							

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**DPPM**  
PROJECT MANAGEMENT

# DPPM Sample Schedule page 3

smartsheet			
File Automation Forms shell building schedule from tom updated DPPM 10-2			
Gantt View Filter Arial 14 B I U S A			
WBS	Task Name	Duration	End Date
2 Sep 9 Sep 16 Sep 23			
T F S S M T W T F S S M T W T F S S M T W T F S S			
120	All easement granted to accommodate final grading	10d	03/02/18
121	Submit NOI to State Water Resources Board	8d	02/05/18
122	Submit to City copy of State's Approved General Permit issued for project (74)	4d	03/14/18
123	Improvement plans shall be substantially complete	0	08/16/18
124	Record right-of-way dedications	3d	02/21/18
125	Submit final hydrology and hydraulic study	0	03/08/18
126	Written approval and binding agreements from each serving utility	0	03/22/18
127	Grading permit	11d	08/31/18
128	GRADING	24d	10/04/18
129	Grading completed	19d	09/27/18
130	Compaction certified	3d	10/02/18
131	Pad elevation certification	3d	10/02/18
132	Rough grad inspection signed off by City Building Inspector	2d	10/04/18
133	BUILDING CONSTRUCTION	301d	11/29/19
134	Building Construction	301d	11/29/19
135	Pad certification	1d	10/05/18
136	Building permit issued	5d	10/12/18
137	Underground utilities	5d	10/19/18
138	Interior footings	7d	10/30/18
139	Building slab	10d	11/13/18
140	Storm	20d	12/11/18
141	Sewer drain	20d	01/08/19
142	Panel-Walls	55d	03/26/19
143	Fire underground	20d	04/23/19
144	List panels	5d	04/30/19
145	Weld	5d	05/07/19
146	Roof column-structural steel	8d	05/17/19
147	Roof Structure	25d	06/21/19
148	Enclosure	30d	08/02/19
149	Interior walls, infrastructure, tenant improvements	90d	10/25/19
150	On-site SCE and Verizon	25d	11/29/19
151	MOVE-IN	5d	12/06/19
152			
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# Project Close-out Calendar

Happy Crew

Client Check-up call

60-day Warranty Walk Through

90-day Warranties End

## 2019

MOVE DAY

Customer Survey Issued!

Client Check-up call

11 Month Warranty Walk Through

12 Month Warranties End

January 2019							February 2019							March 2019							April 2019							
S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	
		1	2	3	4	5						1	2							1			1	2	3	4	5	
6	7	8	9	10	11	12	3	4	5	6	7	8	9	2	3	4	5	6	7	8	6	7	8	9	10	11	12	
13	14	15	16	17	18	19	10	11	12	13	14	15	16	9	10	11	12	13	14	15	13	14	15	16	17	18	19	
20	21	22	23	24	25	26	17	18	19	20	21	22	23	16	17	18	19	20	21	22	20	21	22	23	24	25	26	
27	28	29	30	31			24	25	26	27	28	29	23	24	25	26	27	28	29	27	28	29	30					
													30	31														
May 2019							June 2019							July 2019							August 2019							
S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	
				1	2	3	1	2	3	4	5	6	7		1	2	3	4	5						1	2		
4	5	6	7	8	9	10	8	9	10	11	12	13	14	6	7	8	9	10	11	12	3	4	5	6	7	8	9	
11	12	13	14	15	16	17	15	16	17	18	19	20	21	13	14	15	16	17	18	19	10	11	12	13	14	15	16	
18	19	20	21	22	23	24	22	23	24	25	26	27	28	20	21	22	23	24	25	26	17	18	19	20	21	22	23	
25	26	27	28	29	30	31	29	30						27	28	29	30	31			24	25	26	27	28	29	30	
																			31									
September 2019							October 2019							November 2019							December 2019							
S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	S	M	Tu	W	Th	F	S	
		1	2	3	4	5	6				1	2	3	4							1		1	2	3	4	5	6
7	8	9	10	11	12	13	5	6	7	8	9	10	11	2	3	4	5	6	7	8	7	8	9	10	11	12	13	
14	15	16	17	18	19	20	12	13	14	15	16	17	18	9	10	11	12	13	14	15	14	15	16	17	18	19	20	
21	22	23	24	25	26	27	19	20	21	22	23	24	25	16	17	18	19	20	21	22	21	22	23	24	25	26	27	
28	29	30					26	27	28	29	30	31	23	24	25	26	27	28	29	28	29	30	31					
													30															