

**INTERNAL AUDIT REPORT**

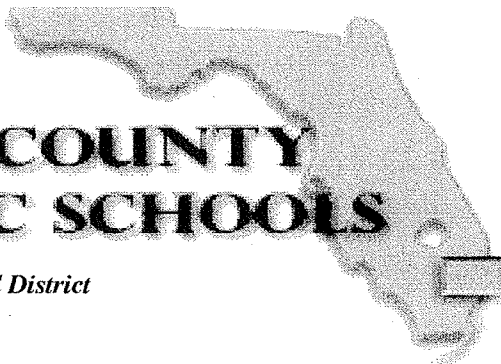
**Review of Construction Services Minor Projects Bid No. 2014-35-FC**

**January 2015**



**BROWARD COUNTY  
PUBLIC SCHOOLS**

*The Nation's Sixth Largest School District*



**To be presented to the:**

**Audit Committee on  
January 22, 2015**

**The School Board of Broward County, Florida on  
February 18, 2015**

**By**

**The Office of the Chief Auditor**



# **Broward County Public Schools**

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**Patrick Reilly, Chief Auditor**  
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*Superintendent of Schools*

January 14, 2015

Members of The School Board of Broward County, Florida  
Members of The School Board Audit Committee  
Mr. Robert W. Runcie, Superintendent of Schools

Ladies and Gentlemen:

In accordance with the 2014-2015 Audit Plan, we reviewed Bid No. 2014-35-FC Construction Services Minor Project for Various Locations (CSMP) for compliance with Contract Documents and School Board Policies. In addition, as part of our audit procedures, we reviewed three Applications for Payment submitted by URS Corporation Southern (Program Manager) for compliance with their approved contract. The Program Manager under the RFQ No. 2014-31-FC contract, was assigned to manage the projects issued from the CSMP contract. The primary objectives of the audit were to determine whether the Office of Facilities & Construction (OFC) and the General/Prime Specialty Contractor complied with contract terms regarding the basis of compensation multiplier; application for payment approval and payment procedures; reimbursements; project insurance requirements; estimate preparation and approval.

In our opinion, the OFC and the Program Manager have several areas that should be strengthened, in order to ensure compliance with contractual requirements mandated by the Construction Services Minor Projects (CSMP) contract Bid No. 2014-35-FC, including M/WBE participation requirements. Other areas include obtaining required insurance prior to issuance of Notices to Proceed for construction projects; ensuring that the labor rates invoiced by the Project Manager do not exceed the contract's approved labor rates, under RFQ No. 2014-31-FC. We have also expressed our concerns with this contract's cost effectiveness due to the lack of permitted drawings being available during the proposal process, deviations between estimated cost and final cost awarded and the lack of competitiveness. The OFC may wish to consider the use of the traditional "hard bid" (Design/Bid/Build) delivery method for small construction projects. This delivery can be more cost effective and provide new, smaller, developing M/WBE and other firms an opportunity to compete for this work and increase their participation. OCA reviewed management's responses and found that the OFC did not adequately address the findings or recommendations of the audit. Follow up responses to management's responses were provided by our office.

This report will be presented to the Audit Committee at its January 22, 2015 meeting and will be presented to the School Board at its February 18, 2015 meeting.

Sincerely,

Patrick Reilly, CPA  
Chief Auditor  
Office of the Chief Auditor

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## **EXECUTIVE SUMMARY**

In accordance with the 2014-2015 Audit Plan, we reviewed Bid No. 2014-35-FC Construction Services Minor Project for Various Locations (CSMP) for compliance with Contract Documents and School Board of Broward County, Florida policies. In addition, as part of our audit procedures, we reviewed three Applications for Payment submitted by URS Corporation Southern (Program Manager) for compliance with their approved contract. The Program Manager under the RFQ No. 2014-31-FC contract, was assigned to manage the projects issued from the CSMP contract.

### **Objectives**

The primary objectives of the audit were to determine whether the Office of Facilities & Construction (OFC) and the General/Prime Specialty Contractor complied with contract terms regarding:

- Basis of Compensation Multiplier;
- Application for Payment approval and payment procedures;
- Reimbursements;
- Project Insurance requirements;
- Estimate preparation and approval.

### **Scope and Methodology**

This review of the CSMP contracts includes a review of the Contract Documents, which consist of the Agreement Form, Addenda, General and Supplementary Conditions of the Contract, Project Manual, Drawings, Specifications, and all modifications issued after the execution of the Contract.

Our audit was conducted in accordance with generally accepted auditing standards and Government Auditing Standards issued by the Comptroller General of the United States. The aforementioned standards require that we plan and perform the audit to ensure a reasonable basis for our judgments and conclusions regarding the function under audit. An audit includes assessments of applicable controls and compliance with the requirements of laws, rules and regulations when necessary to satisfy the audit objectives. We believe that the evidence obtained provides a reasonable basis for our findings and conclusions based on our audit objectives.

It is our responsibility to perform the review under generally accepted auditing standards and Government Auditing Standards, as well as provide recommendations to improve operations, strengthen internal controls and ensure compliance with the requirements of laws, rules and regulations in matters selected for review. It is the administration's responsibility to implement recommendations, to maintain an internal control environment conducive to the safeguarding of District assets and to preserve the District's resources, and to comply with applicable laws, regulations and School Board policies.

The procedures used to satisfy our objectives in this audit included the following:

- Review the Invitation to Bid, Form of Agreement Between Owner & Contractor;
- Review the Applications for Payment;
- Review the Certificates of Insurance, Performance and Payment Bonds;
- Conduct interviews with parties related to the projects;
- Perform other auditing procedures as deemed necessary.

## **Background**

### **Construction Services Minor Projects (CSMP) Bid No. 2014-35-FC**

The Construction Services Minor Projects Contract (CSMP) was developed to expedite single construction projects with a construction value not to exceed \$1,000,000. The use of "Open End" Agreements establishes a pool of pre-qualified General Contractors/Prime Specialty Contractors that competitively bid a single fixed multiplier applied to the cost of work for various projects. Rather than entering into separate agreements each time construction services are required, the Owner and General Contractors/Prime Specialty Contractors have entered into this type of Agreement. The basis of award is determined by the lowest, responsive and responsible bidder as determined by the lowest three decimal places multiplier, 1.000 or less. Bids submitted with a multiplier exceeding 1.000 are rejected.

CSMP Bid No. 2014-35-FC was awarded on March 4, 2014 (See Exhibit A). The original term of the contract is for three (3) years with a one (1) year renewal at the Owner's option and with Board approval. The contract amounts are capped at \$10,000,000 each for General Contractor and Prime Specialty Roofing Contractors categories and \$4,000,000 each for Prime Specialty site utilities contractor, electrical contractor, fire alarms contractor, mechanical contractor, and fire sprinkler/fire suppression categories. The Board may approve an increase of up to \$2,000,000 each for General Contractor and Prime Specialty roofing contractor and \$1,000,000 each for site utilities contractor, electrical contractor and fire alarms, mechanical contractor, and fire sprinkler/fire suppression.

### **Program Management Services RFQ No. 2014-31-FC**

On January 22, 2014, the Board approved the awarding of the contract for RFQ No. 2014-31-FC for Program Management Services RFQ No. 2014-31-FC to URS Corporation Southern (Program Manager) (See Exhibit M). The Program Manager's scope of services include but are not limited to providing, procuring and managing services such as needs assessment, planning, public engagement, project definition, schedule control, cost control, coordination, administration, and management of design, construction and close out services. Currently, the Program Manager is managing the projects under the CSMP contract (Bid No. 2014-35-FC).

## Opinion and Summary of Results

We summarized our observations below:

- The Office of Facilities and Construction (OFC) and the Program Manager did not follow certain contractual requirements mandated by the Construction Services Minor Projects (CSMP) contract Bid No. 2014-35-FC, which include M/WBE participation requirements;
- The Office of Facilities and Construction (OFC) issued Notices to Proceed (NTPs) for construction prior to the Risk Management Department (RMD) reviewing and approving Certificates of Insurance. The Certificates of Insurance accepted by the OFC lacked the required Owners & Contractors Protective Liability Insurance (OCP) and Builder's Risk Insurance (BR) coverage and specific clause language required by the insurance specifications of the General Conditions of the Contract.
- The Office of Facilities & Construction (OFC) approved payments submitted by the Program Manager for invoices that contained labor rates that exceeded the contract's approved labor rates, under RFQ No. 2014-31-FC.

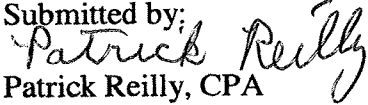
The Office of the Chief Auditor observed that the CSMP contract allows a single contractor to provide a budgetary proposal by using square foot or linear foot unit prices applied to forecasted quantities without a complete set of permit and approved drawings and specifications. Such proposals are not reliable, cost effective and subject to cost increases and delay as the final contract documents are permitted. OCA's opinion is that having a complete set of permitted plans and specifications available to a pool of pre-qualified bidders ensures the entire scope of work is captured at a competitive price and in a timely manner through the use of the CSMP delivery.

The OCA recommends that all CSMP projects begin with a Notice to Proceed and Purchase Order amount to the contractor to provide design services to produce permitted contract documents ready to issue a building permit. The contractor can use the permitted documents to capture the defined scope of work and provide an accurate and reliable estimate for the cost of work. Upon determining that the estimated cost is fair, reasonable and within industry standards, a second Notice to Proceed and Purchase Order will then be issued for the construction cost amount. This recommendation can assist OFC in quantifying work and minimizing changes to the scope and cost of the work after projects have been priced and a Notice to Proceed has been issued.

We would like to thank the Office of Facilities & Construction and all District personnel who aided in the completion of this report.

Audit performed by:

Robert L. Goode  
Gerardo Usallan, Jr

Submitted by:  
  
Patrick Reilly, CPA  
Chief Auditor  
Office of the Chief Auditor

**SECTION I  
FINDINGS**



## **FINDING No. 1**

The Office of Facilities and Construction (OFC) and the Program Manager did not follow certain contractual requirements mandated by the Construction Services Minor Projects (CSMP) contract Bid No. 2014-35-FC, which include M/WBE participation requirements.

## **BACKGROUND**

CSMP Bid No. 2014-35-FC was awarded on March 4, 2014 (See Exhibit A). Document 00520 – Form of Agreement between Owner and Contractor (Agreement) was executed between the School Board of Broward County, FL (SBBC), and five prime specialty contractors; Advanced Roofing, Inc., C&F Electric of Fort Lauderdale, Inc., H.A. Contracting Corp., Koldaire, Inc., and Sprinklermatic Fire Protection Systems, Inc. The term of each Agreement is for three (3) years. The contract amounts are capped at \$10,000,000 each for general contractor and prime specialty roofing contractor categories and \$4,000,000 each for prime specialty site utilities contractor, electrical contractor, fire alarms contractor, mechanical contractor, and fire sprinkler/fire suppression categories. The Agreements may be extended by one year upon Board approval. The Board may approve an increase of up to \$2,000,000 each for general contractor and prime specialty roofing contractor and \$1,000,000 each for prime specialty site utilities contractor, electrical contractor and fire alarms, mechanical contractor, and fire sprinkler/fire suppression.

## **CONDITION**

The Office of the Chief Auditor reviewed four (4) projects for compliance with the contract documents with respect to Estimating Orders, Estimating Recaps, Schedule of Values, Notices to Proceed, M/WBE participation requirements, and Progress Payments:

- Atlantic Technical Center, Project No. P001527;
- Hollywood Hills High, Project No. P000991;
- Riverglades Elementary, Project No. P001442;
- Watkins Elementary, Project No. P001469.

### **1. Estimating Order Form**

The Office of Facilities and Construction (OFC) is required to issue to the contractor an Estimating Order per Document 00800 - Supplementary Conditions of the Contract Article 1 A-D (See Exhibit B) and Document 00520 – Form of Agreement between Owner and Contractor Article 5.01 (See Exhibit C). All four of the projects reviewed had Estimating Order Forms in their files (See Exhibit D-1 through D-4). The forms for Hollywood Hills HS and Watkins ES were not signed by the OFC (See Exhibit D-2 and D-4).

### **2. Estimating Recap Form**

The Estimating Recap is required from the contractor per Document 00800 - Supplementary Conditions of the Contract Article 2 A-C (See Exhibit B) and Document 00520 – Form of Agreement between Owner and Contractor Article 4.03.01 (See Exhibit C).

| <b>OCA Analysis of Estimating Recap Forms</b> |                                  |  |
|---|----------------------------------|--|
| <b>Facility</b>                               | <b>Estimating Recap Received</b> | <b>Comments</b>  |
| Atlantic Technical Center                     | Yes                              | The Time for Substantial Completion of the Work was changed from 30 days on the Estimating Order to 120 days on the Estimating Recap Form (See Exhibit D-1 & E-1).<br>The Time for Final Completion of the Work was changed from 30 days on the Estimating Order to 90 days on this form (See Exhibit D-1 & E-1). The Notice to Proceed has 96 to Substantial Completion and 30 days for Final Completion (See Exhibit H-1). |
| Hollywood Hills HS                            | Yes                              | Estimating Recap Form (See Exhibit E-2) was properly completed and reconciled to the Notice to Proceed (See Exhibit H-2).  |
| Riverglades ES                                | Yes                              | The Time for Substantial Completion of the Work was changed from 90 days on the Estimating Order to 61 days Estimating Recap Form (See Exhibit D-3 & E-3).<br>The Time for Final Completion of the Work was changed from 30 days on the Estimating Order to 91 days on this form (See Exhibit D-3 & E-3). The Notice to Proceed has 54 to Substantial Completion and 30 days for Final Completion (See Exhibit H-3).         |
| Watkins ES                                    | Yes                              | Estimating Recap Form (See Exhibit E-4).was properly completed and reconciled to the Notice to Proceed (See Exhibit H-4).  |

### 3. Schedule of Values Forms

The Schedule of Values (SOV) are required from the contractor per Document 00800 - Supplementary Conditions of the Contract Article 2 A-C (See Exhibit B) and Document 00520 - Form of Agreement between Owner and Contractor Article 4.03.01 (See Exhibit C).

On September 24, 2014, OCA reviewed the project files. There were no SOV's in the files. The following SOV's were provided by OFC on October 21, 2014.

**Atlantic Technical Center:** The SOV provided does not have the Date Submitted filled in (See Exhibit F-1) and is not identified as a document included in the URS Transmittal letter of August 4, 2014 (See Exhibit F-3). This SOV was submitted with Document 01290a Application for Payment No. 1 for the contractor's first request for a progress payment. The SOV and Application for Payment are not compliant with Supplementary Conditions Article 3-E (See Exhibit B) identifying self-performed, subcontracted and sub-subcontracted work or Article 3-G (See Exhibit B) requiring separate line item amounts for overhead and profit amounts.

**Hollywood Hills HS:** The SOV provided is dated August 11, 2014 (See Exhibit F-4). This is almost two months after the June 17, 2014 date of the Estimating Recap Form (See Exhibit E-2). Based on this information, we find no evidence that the SOV was submitted with the Estimating Recap Form on June 17, 2014 as required by Contract Documents. This SOV is not compliant with Supplementary Conditions Article 3 E (See Exhibit B), identifying self-performed, subcontracted and sub-subcontracted work or Article 3 G (See Exhibit B) requiring separate line item amounts for overhead and profit amounts.

**Riverglades ES:** The SOV provided is dated September 5, 2014 (See Exhibit F-6). This is over two months after the June 18, 2014 date of the Estimating Recap Form (See Exhibit E-3). Based on this information, we find no evidence that the SOV was submitted with the Estimating Recap Form on June 18, 2014 as required by Contract Documents.

**Watkins ES:** The SOV provided is dated August 11, 2014 (See Exhibit F-8). This is almost two months after the June 13, 2014 date of the Estimating Recap Form (See Exhibit E-4). Based on this information, we find no evidence that the SOV was submitted with the Estimating Recap Form on June 13, 2014 as required by Contract Documents. The SOV is not compliant with Supplementary Conditions Article 3-E (See Exhibit B) identifying self-performed, subcontracted and sub-subcontracted work or Article 3-G requiring separate line item amounts for overhead and profit amounts (See Exhibit B).

#### 4. Owner's Representatives Cost Determination

Document 00800 - Supplementary Conditions of the Contract Article 3-I states "*The Owner's Representative shall determine the cost based upon the Construction Documents utilizing RS Means and the Single Fixed Multiplier in Document 00520, Form of Agreement in Article 4.01, Table A*" (See Exhibit B).

Document 00520 – Form of Agreement between Owner and Contractor Article 4.05 states "*The Owner's Representative reserves the right to reject a Contractor's lump sum proposal based on inconsistencies on the Contractor's part and/or if it is determined that the lump sum proposal exceeds the RS Means cost prepared by the Owner's Representative or designee utilizing the Single Fixed Multiplier in Table A*" (See Exhibit C).

On September 24, 2014, OCA reviewed the project files. There were no Owner's Representatives Cost Determinations in the files. The following Owner's Representatives Cost Determinations were provided by OFC on October 21, 2014.

**Atlantic Technical Center:** OFC furnished URS's spreadsheet (See Exhibit G-1) dated June 17, 2014, but it is not identified as a document included in the URS Transmittal letter of August 4, 2014 (See Exhibit G-3) as a document supporting approval of the Estimating Recap Form dated June 13, 2014. The Exhibit G-1 spreadsheet identifies a column for RS Means Line Number but does not provide any documentation that the RS Means Facilities Construction Cost Data CostWorks 2014 with City Cost Indexes & Location Factors were used to develop the comparable estimate as required by the Contract Documents Agreement Form 00520 Article 1 Definitions 1.27 and 1.28 (See Exhibit C) and Supplementary Conditions Article 3-I (See Exhibit B). We noted significant differences between the Program Manager's estimate amount of \$366,779.62 (See Exhibit G-2) and the award amount of \$221,000.00 (See Exhibit H-1) in the Notice to Proceed. In addition, we noted that the contractor's 0.900 Single Fixed

Multiplier was shown on the spreadsheet, but was not considered in the final Grand Total SBBC Estimate (See Exhibit G-2).

**Hollywood Hills HS:** OFC furnished URS's spreadsheet dated June 17, 2014 (See Exhibit G-4) which has the same date as the Estimating Recap Form submitted by the contractor (See Exhibit E-2). The Owner's Representative should determine the cost of the project prior to receiving the contractor's estimate.

URS's spreadsheet (See Exhibit G-4) identifies a column for RS Means Line Number but does not provide any documentation that the RS Means Facilities Construction Cost Data CostWorks 2014 with City Cost Indexes & Location Factors were used to develop the comparable estimate as required by the Contract Documents Agreement Form 00520 Article 1 Definitions 1.27 and 1.28 (See Exhibit C) and Supplementary Conditions Article 3 I (See Exhibit B). We noted that the contractor's 0.900 Single Fixed Multiplier was shown on the spreadsheet, but was not considered in the final Grand Total SBBC Estimate (See Exhibit G-4).

**Riverglades ES:** During the plan review process performed by the SBBC Building Department prior to issuing a building permit, a large part of the Scope of Work submitted by the contractor was determined to not be necessary, and was deleted. The original Contract Sum on the Notice to Proceed was \$70,000 (See Exhibit H-3). The contractor completed the work and submitted Application for Payment No.1 in the amount of \$18,818.63 as payment in full. A deductive change order in the amount of \$51,181.37 for the work that was deleted was processed at the November 12, 2014 RSBM (See Exhibit T) as a credit return to the Owner to enable financial close out of the project.

The following table illustrates the variations between the original proposed scope of work cost and the actual final scope of work cost paid.

| Description                                      | Date          | Cost of Work |
|--|---------------|--------------|
| Project Estimate from URS initial project report | May 30, 2014  | \$77,947.00  |
| URS Cost Determination                           | June 17, 2014 | \$80,974.21  |
| URS email with Advanced Roofing price reduction  | June 17, 2014 | \$75,000.00  |
| Advanced Roofing Estimating Recap Form reduction | June 18, 2014 | \$70,000.00  |

| Document  | Date              | Amount               |
|---|-------------------|----------------------|
| Notice to Proceed (Original Contract Amount)<br>(See Exhibit H-3)   | June 25, 2014     | \$70,000.00          |
| Less Credit Change Order No. 1 for deleted work.<br>(See Exhibit T) | November 12, 2014 | <u>(\$51,181.37)</u> |
| Final Project Amount  |                   | <u>\$18,818.63</u>   |

This project is an example of how 73% of the scope of work, \$51,181.37, was determined not to be necessary. The lack of permitted contract documents in advance of providing the construction estimate was certainly a factor that lead to the project cost having to be changed four times and finding 73% of the project cost not necessary.

The spreadsheet (See Exhibit G-5) identifies a column for RS Means Line Number but does not provide any documentation that the RS Means Facilities Construction Cost Data

CostWorks 2014 with City Cost Indexes & Location Factors were used to develop the comparable estimate as required by the Contract Documents Agreement Form 00520 Article 1 Definitions 1.27 and 1.28 (See Exhibit C) and Supplementary Conditions Article 3-I (See Exhibit B). We noted that the contractor's 0.900 Single Fixed Multiplier was shown on the spreadsheet, but was not considered in the final Grand Total SBBC Estimate (See Exhibit G-6).

**Watkins ES:** OFC furnished URS's spreadsheet project cost of \$56,930.98 dated June 17, 2014 (See Exhibit G-7) which is four days after the contractor's submission of the Estimating Recap Form in the amount of \$38,000 on June 13, 2014 (See Exhibit E-4). URS's cost determination should have occurred in advance of the contractor's estimate submission.

The Program Manager's spreadsheet (See Exhibit G-5) identifies a column for RS Means Line Number but does not provide any documentation that the RS Means Facilities Construction Cost Data CostWorks 2014 with City Cost Indexes & Location Factors were used to develop the comparable estimate as required by the Contract Documents Agreement Form 00520 Article 1 Definitions 1.27 and 1.28 (See Exhibit C) and Supplementary Conditions Article 3-I (See Exhibit B). We noted that the contractor's 0.900 Single Fixed Multiplier was shown on the spreadsheet, but was not considered in the final Grand Total SBBC Estimate (See Exhibit G-7).

**5. Notice to Proceed**

Document 00520 – Form of Agreement between Owner and Contractor Article 4.01.01 states *"The Contract amount and Time for Completion for each project shall be identified in the Notice to Proceed"*.

Article 5.02 states *"The Notice to Proceed shall be signed as Approved by the Chief Facilities & Construction Officer or Designee(s)"*.

Article 5.04 states *"The Notice to Proceed shall indicate the Purchase Order number and line number and shall be provided to the Contractor once fully executed by the Office of Facilities and Construction."*

| <b>OCA Form Completion Analysis of Notice to Proceed</b> |                            |                        |                           |                  |
|--|----------------------------|------------------------|---------------------------|------------------|
| <b>Facility</b>  | <b>Time for Completion</b> | <b>Contract Amount</b> | <b>Purchase Order No.</b> | <b>Signature</b> |
| Atlantic Technical Ctr.                                  | Yes                        | Yes                    | Yes                       | Yes              |
| Hollywood Hills HS                                       | Yes                        | Yes                    | Yes                       | Yes              |
| Riverglades ES   | Yes                        | Yes                    | Yes                       | Yes              |
| Watkins ES   | Yes                        | Incorrect*             | Yes                       | Yes              |

**\*Watkins ES:** This Notice to Proceed has two different contract amounts. The Purchase Order amount is \$38,000 and the Contract Sum amount is \$49,679 (See Exhibit H-4). Since all of the Applications for Payment for this project list \$38,000 as the Original Contract Sum (See Exhibit U), we determined the correct contract amount to be \$38,000.

| Facility                | Final Completion Date Per NTP | Actual Final Completion Date            |
|-------------------------|-------------------------------|---|
| Atlantic Technical Ctr. | October 26, 2014              | Project is currently under construction |
| Hollywood Hills HS      | September 16, 2014            | Project is currently under construction |
| Riverglades ES          | September 17, 2014            | September 17, 2014 (See Exhibit H-6)    |
| Watkins ES              | September 16, 2014            | October 27, 2014 (See Exhibit H-5)      |

## 6. M/WBE Participation Requirements

During our review of the M/WBE Participation Requirements, we tested for compliance with the contract terms. Document 00467 – Supplier Diversity & Outreach Program Requirements, which is included in Addendum No. 1 dated October 16, 2013, requires all other contractors (not General Contractors) to meet the M/WBE participation goal of ten (10) percent or more (See Exhibit I-1).

**Atlantic Technical Center and Riverglades ES:** Advanced Roofing, Inc. is not a certified M/WBE contractor (See Exhibit I-5). The M/WBE participation goal for Advanced Roofing, Inc. is ten (10) percent or more. The monthly M/WBE Subcontractor Utilization Report submitted by Advanced Roofing, Inc. for Application for Payment No. 1 does not list any M/WBE subcontractors on the report (See Exhibit I-2). We have asked the project manager, by email, to provide all of Advanced Roofing, Inc.'s M/WBE subcontractors on this project, but none have been provided. If no M/WBE subcontractors were used on this project, the M/WBE Coordinator should be contacted to ensure compliance with paragraphs No. 5 and No. 6 or take the appropriate action under paragraph No. 2 of Document 00467 Supplier Diversity & Outreach Program Requirements.

**Hollywood Hills Elementary:** Koldaire, Inc. submission of the monthly M/WBE Subcontractor Utilization Report is compliant with the contract terms as it established a 21% participation goal which exceeded the 10% minimum goal requirement (See Exhibit I-3).

**Watkins Elementary:** Koldaire, Inc. submission of the monthly M/WBE Subcontractor Utilization Report is compliant with the contract terms as it established a 14% participation goal which exceeded the 10% minimum goal requirement (See Exhibit I-4).

## 7. Progress Payments

**Atlantic Technical Center:** We reviewed Application for Payment No. 1 for the period up to October 3, 2014. The \$51,650.19 invoiced represents twenty three percent (23%) of the original contract sum of \$221,000. This project is currently under construction. We found no exceptions with this document, other than the lack of the M/WBE required participation outlined in Item 6 above.

**Hollywood Hills High:** We reviewed Application for Payment No. 1 for the period up to September 15, 2014. The \$10,530 invoiced represents twenty one percent (21%) of the original contract sum of \$49,679. Application for Payment No. 2 is for the period from September 16, 2014 to October 24, 2014. The \$28,064 invoiced represents fifty six percent (56%) of the original contract sum of \$49,679. This project is currently under construction. We found no exceptions with this document.

**Riverglades Elementary:** We reviewed Application for Payment No. 1 for the period up to September 16, 2014. The \$16,936.77 invoiced represents twenty four percent (24%) of the original contract sum of \$70,000. This project was completed on September 17, 2014, as evidenced by a Certificate of Completion from the SBBC Building Department. We found no exceptions with this document, other than the lack of the M/WBE required participation outlined in Item 6 above. Please refer to the table in Item 4, page 7, for a complete analysis of final project amount.

**Watkins Elementary:** We reviewed Application for Payment No. 1 for the period up to September 15, 2014. The \$5,670.00 invoiced represents fifteen percent (15%) of the original contract sum of \$38,000. Application for Payment No. 2 is for the period from September 16, 2014 to September 30, 2014. The \$28,530 invoiced represents seventy five percent (75%) of the original contract sum of \$38,000. Application for Payment No. 3 is for the period from October 1, 2014 to October 14, 2014. The \$3,800 invoiced represents retainage amount of ten percent (10%) of the original contract sum of \$38,000. This project was completed on September 17, 2014, as evidenced by a Certificate of Completion from the SBBC Building Department. We found no exceptions with this document. Exhibit U shows all three Applications for Payment for this project.

## **CRITERIA**

The CSMP contract and Supplementary Conditions clearly set forth the processes, steps and forms the OFC and URS are required to use and follow during their administration of this type of contract.

## **CAUSE**

Non-compliance with the contract terms by OFC and URS compromises the SBBC's position by weakening safeguards in place intended to protect the SBBC.

## **IMPACT**

OFC's failure to enforce contract terms allows the contractor to avoid the terms and conditions intended to ensure the price was correctly evaluated and determined to be a fair, reasonable, acceptable price and meet the M/WBE required participation goals.

## **RECOMMENDATIONS**

1. OFC and URS staff should strengthen their administration of this contract by following and enforcing all the terms in the chronological order set forth in the contract. Strict compliance with the contract terms ensures the safeguards built into the contract protect the SBBC interests and minimize risk.
2. The Department of Procurement & Warehousing Services' Supplier Diversity & Outreach Program should follow-up with Advanced Roofing, Inc. to remedy the noncompliance issue with respect to meeting the required 10% M/WBE participation goal for both the Atlantic Technical Center and Riverglades Elementary School projects and take the appropriate action necessary.
3. OCA recommends that all CSMP projects should begin with a Notice to Proceed and Purchase Order amount to the contractor to provide design services to produce permitted contract

documents ready to issue a building permit. The contractor can use the permitted documents to capture the defined scope of work and provide an accurate and reliable estimate for the cost of work. Upon determining that the estimated cost is fair, reasonable and within industry standards, a second Notice to Proceed and Purchase Order will then be issued for the construction cost amount.

### **MANAGEMENT'S RESPONSE - Office of Facilities & Construction (OFC)**

**Status:** On September 24, 2014, a staff member from the Office of the Chief Auditor (OCA) made an informal visit to the Office of Facilities & Construction (OFC) to review the Construction Services Minor Projects' files. A formal request was then sent to the Chief Facilities Officer on September 30, 2014, requesting specific documents related to four in-progress CSMP projects. The requested documents were subsequently forwarded to OCA on October 21, 2014. OFC is not aware of what was reviewed by the OCA staff member on September 24, 2014, however, when formally requested, OFC provided the necessary documentation which illustrates that the Program Manager is adhering to the requirements of the CSMP contract and process.

In addition, the Program Manager is diligently working with all contractors to ensure that the M/WBE participation goals are met or exceeded.

### **The Office of the Chief Auditor's Follow Up Response**

The OCA does not consider the January 13, 2015 OFC Management Responses to the CSMP audit adequate or acceptable as they do not address the findings or recommendations of the audit.

OCA formally notified the OFC, per our August 29, 2014 engagement letter identifying the audit and the four selected projects to be audited. OCA's September 24, 2014 review of the project files was not informal and followed the auditing protocol of proper notice to the auditee. OFC was notified in advance regarding what the auditors were there to review. On our September 24, 2014 visit to OFC's office, two auditors met with URS's Senior Project Manager to review four project files. The auditors were there to review the four project files to verify compliance with contract terms. In addition, the documentation that was provided three weeks after our September 30, 2014 request, did not illustrate that the Program Manager was adhering to the requirements of the CSMP contract and processes.



## **FINDING No. 2**

The Office of Facilities and Construction (OFC) issued Notices to Proceed (NTPs) for construction prior to the Risk Management Department (RMD) reviewing and approving Certificates of Insurance. The Certificates of Insurance accepted by the OFC lacked the required Owners & Contractors Protective Liability Insurance (OCP) and Builder's Risk Insurance (BR) coverage and specific clause language required by the insurance specifications of the General Conditions of the Contract.

## **BACKGROUND**

The contract documents for the CSMP Project No. 2014-35-FC require that contractors provide different types of insurance. Document 00700 – General Conditions of the Contract (General Conditions), Article 42, specifically requires the contractor to provide Commercial General Liability Insurance (CGL), Owners & Contractors Protective Liability Insurance (OCP), Automobile Liability Insurance (AL), Workers' Compensation Insurance (WC), and Builders' Risk Insurance (BR) (See Exhibit J). It also requires specific clauses that must be included in insurance certificates. Owners & Contractors Protective Liability (OCP) covers the named insured's liability arising out of operations performed for it by independent contractors when the liability is imposed directly on the named insured because of its general supervision of the independent contractor or subcontractors.

## **CONDITION**

The Office of the Chief Auditor reviewed four (4) projects for insurance compliance with the contract documents:

- Atlantic Technical Center, Project No. P001527;
- Hollywood Hills High, Project No. P000991;
- Riverglades Elementary, Project No. P001442;
- Watkins Elementary, Project No. P001469.

### **Advanced Roofing, Inc., Atlantic Technical Center, Project No. P001527:**

The project specific Insurance Certificate submitted by Advanced Roofing, Inc. dated July 14, 2014 does not include the required OCP Insurance, nor does it include the required wording as per General Conditions Articles 42.17.1.4 (See Exhibit L-2).

### **Advanced Roofing, Inc., Riverglades Elementary, Project No. P001442:**

The project specific Insurance Certificate submitted by Advanced Roofing, Inc. dated July 24, 2014 does not include OCP Insurance, nor does it include the required wording as per General Conditions Articles 42.17.1.4 (See Exhibit L-3).

### **Koldaire, Inc., Watkins Elementary, Project No. P001469:**

The project specific Insurance Certificate dated June 10, 2014 does not include OCP insurance, nor does it contain the required wording as per General Conditions Articles 42.17.1.1 (Endorsement Number), 42.17.1.2 and 42.17.1.4 (See Exhibit L-4). The second Insurance Certificate dated June 17, 2014 does include OCP insurance (See Exhibit L-5).

**Koldaire, Inc., Hollywood Hills High, Project No. P000991:**

Koldaire Inc., submitted two project specific Certificates of Insurance. The one dated June 10, 2014, does not include the required OCP Insurance, nor does it contain the General Conditions Articles 42.17.1.1 (Endorsement Number), 42.17.1.2 and 42.17.1.4 (See Exhibit L-6). The second one dated June 17, 2014 does include OCP Insurance (See Exhibit L-7).

**CRITERIA**

Certificate of Insurance must be provided to the District within twenty (20) consecutive calendar days after receipt of Document 00510 – Notice of Award (See Exhibit K).

Document 00700 – General Conditions of the Contract, Article 42.17.1 (See Exhibit J) states *“Liability Policies are to contain the following provisions. In addition, the following wording must be included on the Certificate of Insurance:*

- *42.17.1.1 The School Board of Broward County, Florida, its members, officers, employees and agents are added as additional insured. The endorsement # is: \_\_\_\_\_.*
- *42.17.1.2 All liability policies are primary of all other valid and collectable coverage maintained by the School Board of Broward County, Florida.*
- *42.17.1.3 Contractual liability is included in the General Liability policy.*
- *42.17.1.4 Builder's Risk/Installation Floater policy must contain the following wording and appear on the certificate: Builder's Risk limits are insured at 100% of the contract value and include both hard and soft costs. Please include the Project Number and Project Name on the Certificate of Insurance”.*

**CAUSE**

The CSMP contract insurance review and approval process is a function of the RMD. The OFC did not follow RMD’s insurance review and approval procedure for Owners & Contractors Protective Liability Insurance and Builder’s Risk Insurance before issuing Notices to Proceed for construction (See Exhibit V).

**IMPACT**

CSMP contractors were allowed to provide insurance certificates that did not comply with the contract insurance provisions and commenced the work in the field without compliant insurance coverage certificates in place. The lack of specified insurance coverage exposes the SBBC to potential insurance risks and claims.

## **RECOMMENDATION**

1. The OCA recommends that OFC follow RMD's approval procedure, which has been established for several years, to submit the contractor's OCP and BR Insurance Certificates to the RMD for review and approval, prior to issuing NTPs for construction.
2. The OCA recommends the Installation Floater coverage that RMD allows to be substituted in lieu of the traditional Builders Risk policy, be written in the full 100% project contract amount rather than one large amount, hundreds of thousands of dollars more than the project contract amount. Insuring the actual project contract amount would eliminate the necessary accounting to track the Installation Floater large lump sum amount as new added project contract amounts encumber a portion of the Installation Floater large lump sum amount.

## **MANAGEMENT'S RESPONSE - Office of Facilities & Construction (OFC)**

**Status:** OFC is continuing to adhere to the terms of the contract with respect to all insurance requirements and is currently in compliance on the projects reviewed as part of this audit.

To further ensure compliance, OFC and the Risk Management Department (RMD) have developed a process whereby RMD will sign-off on the Notice to Proceed, signifying compliance with the insurance requirements of the contract.

### **The Office of the Chief Auditor's Follow Up Response**

Regarding OFC's statement that "OFC is continuing to adhere to the terms of the contract with respect to all insurance requirements and is currently in compliance on the projects reviewed as part of this audit", OCA disagrees. Per the audit, we identified that the Certificates of Insurance were sent to Risk Management after the Notices to Proceed were issued. On one project, the Notice to Proceed was not sent to Risk Management until after the project was completed.

Regarding OFC's statement that "OFC and the Risk Management Department (RMD) have developed a process . . ." per the Director of Risk Management (see Exhibit V-2), a process has been in place for a number of years.

### **FINDING No. 3**

The Office of Facilities & Construction (OFC) approved payments submitted by the Program Manager for invoices that contained labor rates that exceeded the contract's approved labor rates, under RFQ No. 2014-31-FC.

### **BACKGROUND**

On January 22, 2014, the Board awarded the contract for RFQ No. 2014-31-FC for Program Management Services to URS Corporation Southern (Program Manager) (See Exhibit M). The Program Manager's scope of services include but are not limited to providing, procuring and managing services such as needs assessment, planning, public engagement, project definition, schedule control, cost control, coordination, administration, and management of design, construction and close out services. On December 9, 2013, the Office of the Chief Auditor informed the OFC that there were mathematical errors with the labor rates submitted by the Program Manager. OCA provided a schedule outlining the corrected labor rates (See Exhibit N). On December 13, 2013, OCA again, via a memo, notified the OFC that there were math errors with the labor rates submitted by the Program Manager (See Exhibit O-4).

### **CONDITION**

On August 26, 2014, the OFC approved the Program Manager's Invoice No. 5929083 in the amount of \$246,972.93 for Program Management Services for the period between February 13, 2014 and May 29, 2014. This invoice contained itemized labor rates that were different than the labor rates approved by the Board (See Exhibits M and P). OCA's analysis of this invoice identifies a credit due the Board of \$1,382.03 (See Exhibit S).

On October 13, 2014, the OFC approved the Program Manager's Invoice No. 6017151 in the amount of \$165,733.84 for Program Management Services for the period between May 12, 2014 and June 30, 2014. This invoice contained itemized labor rates that were different than the labor rates approved by the Board (See Exhibits M and Q). OCA's analysis of this invoice identifies a credit due the Board of \$557.84 (See Exhibit S).

On November 20, 2014, the OFC approved the Program Manager's Invoice No. 6039983 in the amount of \$365,435.48 for Program Management Services for the period between July 1, 2014 and September 30, 2014. This invoice contained itemized labor rates that were different than the labor rates approved by the Board (See Exhibits M and R). OCA's analysis of this invoice identifies a credit due the Board of \$1,642.87 (See Exhibit S).

Per the SAP Accounting System, we determined that all invoices were paid to the vendor.

### **CRITERIA**

The Agreement for Open End Services for Program Management Services between The School Board of Broward County and Program Manager, Article 5.3 Direct Salary Expense, includes the not-to-exceed labor rates that are to be charged by the Program Manager for their services. This Agreement was approved by the SBBC on January 22, 2014 (See Exhibit M).

## **CAUSE**

The OFC did not enforce the Program Manager's contract terms.

## **IMPACT**

The OFC processed overpayments of salaries in the amount of \$3,582.74 for the Program Manager's staff which were not in accordance with their contract.

## **RECOMMENDATIONS**

We recommend that the OFC request a credit from the Program Manager in the amount of \$3,582.74 (See Exhibit S) for the overbilling of the labor rates.

## **MANAGEMENT'S RESPONSE - Office of Facilities & Construction (OFC)**

**Status:** OFC approved invoices submitted by the Program Manager with labor rates that are in compliance with the labor rates approved by the Board on January 22, 2014.

## **The Office of the Chief Auditor's Follow Up Response**

The OCA does not agree with the following OFC Management Response; "OFC approved invoices submitted by the Program Manager with labor rates that are in compliance with the labor rates approved by the Board on January 22, 2014." Our audit identifies both the Board approved labor rates (Exhibit M, page 86) and the incorrect labor rates (see Exhibit N, page 88). The Board approved labor rates were not used.

In addition, we noted the external audit firm, McGladrey, LLP, contracted to monitor the Program Manager, reviewed the first invoice submitted by URS, and identified that URS did not comply with the contractually agreed upon labor rates (see Exhibit X). We also noted a fourth invoice has been received that also contains incorrect labor rates (see Exhibit W).

**SECTION II**  
**EXHIBITS**



**Document 00800  
SUPPLEMENTARY CONDITIONS  
OF THE  
CONTRACT**

**ARTICLE 1 ESTIMATING ORDER**

- A. The Contractor shall proceed with the preparation of the Lump Sum proposal in the form of the Estimating Recap Form and Schedule of Values included in this Contract.
- B. The Estimating Order shall provide the scope of the Work, time for completion of the Work, and construction documents approved by the District's Chief Building Official.
- C. The Contractor shall not proceed to prepare a proposal without an Estimating Order in the form provided in the Contract executed by the Chief Facilities and Construction Officer.
- D. The Contractor shall provide a completed proposal estimate in the form of the Estimating Recap Form and Schedule of Values within ten (10) consecutive calendar days from receipt of the Estimating Order.

**ARTICLE 2 ESTIMATING RECAP FORM**

- A. The Contractor shall fully complete the Estimating Recap Form based upon the Schedule of Values attached thereto.
- B. The Contractor shall acknowledge the scope of Work and time for completion of the Work on the Estimating Recap Form.
- C. The Estimating Recap Form shall become a part of the Contract along with the Estimating Order, Project Cost Sheet, Construction Documents, and other documents received from the Project Manager or Project Consultant pertaining to the scope of the Work, time for completion of the Work, and other terms and conditions relating to the Work.

**ARTICLE 3 SCHEDULE OF VALUES**

- A. The Contractor shall fully complete the Schedule of Values and attach it to the Estimating Recap Sheet as the proposal estimate submitted to the Project Manager.
- B. The Contractor shall submit the proposal estimate to the Project Manager and Project Consultant simultaneously.
- C. The Contractor shall list each item of Work separately and in accordance with the Schedule of Values.
- D. The Contractor shall indicate each line item on the Schedule of Values.

- E. The Contractor shall indicate the Work performed by itself and its Subcontractors, Sub-Subcontractors, and all other entities, on the Schedule of Values.



# EXHIBIT B

F. The Contractor shall not propose work in any manner other than as a lump sum.

G. The Contractor shall indicate the amounts for overhead and profit on separate lines of the Schedule of Values.

H. The Contractor shall be entitled to costs for General Requirements and General Conditions items required in the Estimating Order only. Such costs shall be limited to direct costs for the required management and support of the Work in the field. The Contractor shall not be entitled to any home office costs of any kind.

I. The Owner's Representative shall determine the cost based upon the Construction Documents utilizing RS Means and the Single Fixed Multiplier in Document 00520, Form of Agreement in Article 4.01, Table A.

J. The Contractor's Lump Sum Cost Proposal will be compared with the cost in Article I above and shall be rejected if it exceeds the amount determined as the cost.

K. The Contractor's Lump Sum Cost Proposal may be accepted and may result in issuance of a NTP and purchase order.

L. The Owner reserves the right to not issue a NTP and purchase order. The Contractor agrees that it is not entitled to compensation for the preparation of the Lump Sum Cost Proposal or any other costs should the Owner not issue a NTP and purchase order.

General Conditions which may be Cost of the Work, if specifically included in the Construction Documents, include but are not limited to: field office rental, field office setup, field office janitorial, field office security, field office furniture, temporary storage containers, temporary plywood partitions, copy machines, fax machines, computers, postage, couriers, blueprints and copies of blueprints, as built drawings, closeout documents, Critical Path Method Scheduling consultants, security guards, I.D. badges, drug testing, living expenses, progress photographs, quality control systems, daily cleanup, final cleaning, pest control, trash dumpsters and associated fees, trash hauling equipment, trash chutes, scaffolding, radios, surveys and layouts, geotechnical surveys, job signs, safety rails, safety supplies, first aid supplies, safety inspections, water/ice/cups, fire extinguishers, temporary roads, tree protection, small tools, temporary fencing, silt fencing, barricades, material unloading, material hoists, personnel hoists, golf carts, punch lists, telephone systems and associated charges, electric charges, water charges, temporary heat, portable toilets and tanks, general purpose labor, general purpose carpenters, salaries at project site, horizontal and vertical transportation of materials and personnel, parking space, storage, and the costs of the Superintendent and Project Manager.

## **ARTICLE 4 NOTICE TO PROCEED**

A. The Contractor shall proceed with the Work upon receipt of the fully executed and approved, by all parties, Notice to Proceed ("NTP") referenced within the Contract, Purchase Order, and Building Permit.

# EXHIBIT B

- B. The Contractor shall comply with the terms included in the NTP and by reference the Estimating Order, Estimating Recap Form, Schedule of Values, Construction Documents, and other documents received from the Project Manager or Project Consultant pertaining to the scope of the Work, time for completion of the Work, and other terms and conditions relating to the Work.
- C. The Contractor shall not proceed with the Work prior to receipt of the fully executed and approved, by all parties, Notice to Proceed ("NTP") referenced within the Contract, Purchase Order, and Building Permit.

## **ARTICLE 5 PROGRESS PAYMENTS**

- A. The Contractor shall submit progress payments on Documents 00435 and 01290a. The progress payments shall be an accurate accounting of all costs to date and in the current period.
- B. The Contractor shall tabulate all unit quantities consumed in the Work listed according to the approved Schedule of Values and attach same to each Document 00435 and 01290a submitted for payment.
- C. The Contractor shall include the total costs in Section B above on Document 00435.
- D. The Contractor, by submitting the progress payments, certifies that the Work presented in the progress payment is accurate.
- E. The Contractor shall provide all documentation substantiating the Work including but not limited to time sheets, payroll registers, cancelled checks, subcontracts, invoices, change orders, agreements, purchase orders, leases, contracts, commitments, field notes, daily diaries, superintendent reports, drawings, receipts, vouchers and other documents accounting, measuring, or otherwise quantifying the completed Work.
- F. The Owner may employ the Project Consultant or a third party to review the Work performed by the Contractor.
- G. The Contractor shall not be entitled to additional costs in the event it claims it omitted costs for Work included in the Construction Documents.

**END OF DOCUMENT**

**DOCUMENT 00520**

**FORM OF AGREEMENT  
BETWEEN OWNER AND CONTRACTOR**

THIS AGREEMENT made and entered into this 4th day of March in the year 2014 by and between

**THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**

(Hereinafter referred to as "Owner") and

**ADVANCED ROOFING, INC.**

1950 NW 22<sup>nd</sup> Street  
Fort Lauderdale, FL 33311

FEIN#59-2360591

(Hereinafter referred to as "**Contractor**".)

**WHEREAS**, it is agreed that this Agreement is an "Open End" Agreement in that the Owner will from time to time during the term of this Agreement require services, which may include labor, materials, and/or services from the Contractor on various projects; and

**WHEREAS**, rather than enter into separate agreements each time that is required, the Owner and Contractor have entered into this Agreement; and

**WHEREAS**, the terms and conditions of this Agreement shall govern each of the individual Projects for which the Contractor is properly authorized to perform; and

**WHEREAS**, the Contractor is desirous of performing the Work in accordance with the Contract Documents and all applicable laws, codes and ordinances.

**NOW THEREFORE**, in exchange for the mutual covenants and promises set forth herein agreed to by the Owner and the Contractor, the parties agree as follows:

**ARTICLE 1 -DEFINITIONS**

1.01 **Definitions:**

1.02 **The Chief Facilities and Construction Officer** - An employee of The School Board of Broward County, Florida, who has the authority and responsibility for oversight and management for the Owner of the specific project of which the Work is a part. Referred to hereinafter as the Chief.

# EXHIBIT C

- 1.20 **Scope of Work** - The totality of the obligations, including construction and other services, imposed on the Contractor by the Contract Documents, whether completed or partially completed, and including all labor, materials, equipment, and services provided or to be provided by the Contractor to fulfill its obligations. The Work may constitute the whole or a part of the Project or Services.
- 1.21 **Written Notice** - Shall be deemed to have been duly served if delivered in person to the individual or to a member of the firm or to an officer of the corporation for whom it is intended, if delivered at or sent by registered mail or other traceable delivery service to the last business address known to the entity serving notice. Electronic, FAX or other telephonic transmission **shall not be** considered as a written notice.
- 1.22 **Notice to Proceed (NTP)** - Issued by the Owner's representative to the Contractor authorizing all or a portion of the Work to proceed. The NTP includes and incorporates the Schedule of Values Sheet and Estimating Recap form and establishes the Contract amount for the Work encompassed by the NTP.
- 1.23 **Senior Project Manager** - An employee of the Owner referred to hereinafter as the "SENIOR PM" and who is the direct Supervisor of the Project Manager.
- 1.24 **Estimating Order** - Written request on a form within the Agreement to the Contractor executed by the Chief requesting an estimate for a specific Project.
- 1.25 **Schedule of Values Sheet** - A form within the Agreement completed by the Contractor for the purpose of providing estimate Lump Sum Proposal estimate for a specific Project.
- 1.26 **Estimating Recap Form** - A form within the Agreement completed by the Contractor for the purpose of summarizing the estimate provided in the Schedule of Values Sheet for a specific Project.
- 1.27 **RS Means Facilities Construction Cost Data** - The document published by RS Means, A division of Reed Construction Publishers and Consultants, 700 Longwater Drive, Norwell MA, 02061, U.S.A., referenced in the Agreement that is utilized to evaluate Lump Sum Proposals and additional work and/or Change Orders documents.
- 1.28 **RS Means CostWorks** - Software that replicates and automates the data contained in the RS Means Facilities Construction Cost Data.
- 1.29 **Contract Documents** - Collectively those documents which define the Scope of Work and how such Work shall be performed. The documents which constitute the Contract Documents include but are not limited to this Agreement and associated Bid Documents, Construction Documents, Notice to Proceed, Addendum and other revisions to the Construction Documents,

# EXHIBIT C

expenses, or damages incurred by the Owner and forfeiture of claims for damages, extensions of time/delay damages or other compensation related to the use of Owner furnished materials.

## 3.03 Project Management:

- 3.03.01 The Chief or designee shall act on behalf of the Owner in all matters pertaining to this Agreement, and shall approve all Notices to Proceed to the Contractor and all invoices for payment to the Contractor.
- 3.03.02 **Non-Conforming Work:** If the Owner (by way of BCI's or other Owner personnel) observes or otherwise becomes aware of any fault or defective work in the Project, or other non-conformance with the Contract Documents during the construction phases, the Owner shall give prompt notice thereof to the Contractor. However, whether the Owner observes a defect or not, it is the Contractor's duty and responsibility to determine whether its work is defective, faulty, or not in compliance with the Contract Documents. If the Contractor determines that the Work is defective, faulty or not in conformance with the Contract Documents, the Contractor shall advise the Owner in writing, and make recommendations to the Owner concerning correction of the work and require the Contractor to undertake such corrections as allowed by the Contract Documents. Final determination of whether the work is defective, faulty or not in compliance with the Contract Documents shall be determined by the Owner's Representative.

## **ARTICLE 4 - BASIS OF COMPENSATION**

- 4.01 The Single Fixed Multiplier, as found in Document 00410, Bid Form, submitted within Contractor's Bid and is herewith incorporated into this Agreement is utilized to evaluate the Contractor's Lump Sum Proposal, additional work, and Change Orders.

### **BASE BID: TABLE A**

| Work Category                         | Item No. 1              |              |
|---------------------------------------|-------------------------|--------------|
| Roofing Contractor -<br>main contract | Single Fixed Multiplier | 0.900        |
|                                       | Contract Amount         | \$10,000,000 |
|                                       | Renewable Amount        | \$2,000,000  |

- 4.01.01 The Contract amount and Time for Completion for each project shall be identified in the Notice to Proceed. The Contract amount for each project shall be the approved Lump Sum Proposal amount Multiplier.

### 4.02 Reimbursements:

- 4.02.01 Reimbursements will be made for land survey data, construction testing services, performance and payment bonds, builder's risk insurance, Owner's I.D. badges and permitting fees only with the prior written approval of the Owner's Representative. This reimbursement shall be based on an actual cost and supported by documentation as required by the Owner's

# EXHIBIT C

Representative. (Reimbursements are not subject to Single Fixed Multiplier.)

## 4.03 Estimates:

4.03.01 Estimates shall be in the form of the Estimating Recap Form and Schedule of Values Sheet. Estimates shall include and be based upon all of the Work included in the Contract Documents and detailed in the Scope of Work. Estimates will be in a form deemed suitable by the Owner's Representative, as indicated in the Estimating Order from Work.

4.04 The Schedule of Values shall be comprised of the following:

4.04.01 The Estimating Recap Form and Schedule of Values Sheet shall be submitted with the Lump Sum Proposal.

4.05 The Owner's Representative reserves the right to reject a Contractor's lump-sum proposal based on inconsistencies on the Contractor's part and/or if it is determined that the lump sum proposal exceeds the RS Means cost prepared by the Owner's Representative or designee utilizing the Single Fixed Multiplier in Table A. ~~The Contractor has the obligation to confirm the~~ Work shown in the Contractor's proposal is consistent and complete with respect to the Construction Documents proposals. The Owner has the right to require the Contractor to provide additional documentation such as sketches, drawings or plans as necessary. The Owner also reserves the right to not award a project if Owner's requirement is no longer valid. In these instances, the Contractor has no right of claim to recoup proposal expenses. The Contractor shall not include the following items in their proposal regardless of pricing structure:

- a. Bonuses, profit sharing and any discretionary form of compensation or fringe benefits.
- b. The Contractor's capital expenses, including interest on the Contractor's capital employed for the work.
- c. Costs due to the negligence or willful misconduct of the Contractor, Subcontractors, suppliers, or anyone directly or indirectly employed by any of them or for whose act any of them may be liable.
- d. Tools and equipment with an individual cost of \$500 or less.
- e. Cell phone charges in excess of \$100 per authorized employee as approved by the Owner.
- f. Discretionary labor benefits such as, but not limited to; cost of living adjustments, auto allowances, etc. unless previously approved by the Owner.

# EXHIBIT C

- g. Overtime charges not previously authorized in writing by the Owner.
- h. Any travel, subsistence, fuel, mileage, or similar classification of cost not previously approved in writing by the Owner.

## ARTICLE 5 - ESTIMATING ORDER

5.01 The Chief shall authorize each Estimating Order. The Contractor shall not be entitled to reimbursement for the preparation of the estimate, Estimating Recap Form and Schedule of Values Sheet. The Contractor shall not prepare the estimate, Estimating Recap Form and Schedule of Values without an Estimating Order. The Estimating Order and the attachments will describe the extent of the Work to be performed by the Contractor. Descriptions may be written by sketch or by drawing. Each Estimating Order and attachments will give the location where work is to be performed and whether or not work may be performed during regular working hours. Each Estimating Order shall describe the requirements for submittals. Submittals may include certificates, shop drawings, manufacturer's literature, data, test reports and/or other documents that provide required information on the material and/or equipment.

5.02 Each Estimating Order shall be acknowledged within the time specified on the Estimating Order by the Contractor's submittal of the Estimating Recap Form, Schedule of Values Sheet and all other documents specified within the Estimating Order and attachments. The Estimating Recap Form, Schedule of Value Sheet and other documents will be reviewed by the Project Manager and, if found to be acceptable by the Project Manager, the Notice to Proceed will be presented to the Contractor for approval. The Notice to Proceed shall be signed as Approved by the Chief Facilities & Construction Officer or Designee(s).

5.03 If, after initial review of the Estimating Recap Form, Schedule of Values Sheet and any other documents submitted by the Contractor to the Project Manager, the Notice to Proceed cannot be signed, an extended review period may be initiated.

5.04 The Notice to Proceed shall indicate the Purchase Order number and line number and shall be provided to the Contractor once fully executed by the Office of Facilities and Construction.

## ARTICLE 6 - PURCHASE ORDERS

6.01 No work shall be performed until a written Purchase Order with the appropriate "line number" has been issued by the Purchasing Department together with a fully executed Notice to Proceed. The "Start Date" will be shown on the Notice to Proceed. **ANY WORK PERFORMED BY THE CONTRACTOR PRIOR TO RECEIPT OF A FULLY EXECUTED WRITTEN NOTICE TO PROCEED AND PURCHASE ORDER SHALL BE AT THE CONTRACTOR'S OWN RISK.**



**The School Board of Broward County, Florida  
Supply Management & Logistics Department 7720  
W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351**

**(754) 321-0505**

**Document 00800a: ESTIMATING ORDER**

**Via - Fax, Email**

**Date: May 16, 2014**

**Daniel Stokes  
Advanced Roofing  
1950 NW 22<sup>nd</sup> Street  
Fort Lauderdale, FL 33311**

**Facility: Atlantic Technical Center  
Number: 2221  
Project No.: P.001527  
Project Title: Reroof Building 8**

Dear Mr. Stokes:

Please submit a cost estimate for this project utilizing the Construction Services Minor Projects Contract dated March 4, 2014 for Roofing Services. Submit your estimate in writing on the Estimating Recap Form and Project Cost Sheet. **Please contact Jason Fair, Project Manager for further instructions at 754-321-1532 or email to [jason.fair@browardschools.com](mailto:jason.fair@browardschools.com).**

Submit your estimate proposal to Jason Fair, PM at the Office of Facilities & Construction within ten (10) days of your receipt of this Estimating Order and copy the Construction Purchasing Agent, Mr. Denis Herrmann at the above address.

|   |   |
|---|---|
| Time for Completion of the Work         | 30 Consecutive Calendar Days from the date stipulated on the Notice to Proceed for Substantial Completion |
| Time for Completion of Final Completion | 30 Consecutive Calendar Days from Substantial Completion  |

If you have any questions, please contact Denis Herrmann, Construction Purchasing Agent at 754-321-0505 or email to [Denish@browardschools.com](mailto:Denish@browardschools.com).

Sincerely,

*Shelley Meloni*  
Shelley Meloni

Task Assigned Chief Facilities & Construction Officer Office of Facilities & Construction

**Attachments**

- Scope of Work 5/16/14,
- cc: Sonja Coley, Senior Project Manager
- Daniel Minich, Senior Project Manager
- Jason Fair, Project Manager
- Denis Herrmann, Construction Purchasing Agent
- Philomene Tomasino, Project File





**The School Board of Broward County, Florida  
Supply Management & Logistics Department 7720  
W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351**

**(754) 321-0505**

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**Document 00800a: ESTIMATING ORDER**

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Via - Fax, Email

Date: May 26, 2014

**Frank O. Monti Jr., President  
Koldalre, Inc.  
4659 NW 103<sup>rd</sup> Ave  
Sunrise, FL 33351**

**Facility: Hollywood Hills High School  
Number: 1661  
Project No.: P.000991  
Project Title: AC DX Building 1 Room 111D & Exhaust Fan Room 234**

Dear Mr. Monti:

Please submit a cost estimate for this project utilizing the Construction Services Minor Projects Contract dated March 4, 2014 for Mechanical Services. Submit your estimate in writing on the Estimating Recap Form and Project Cost Sheet. Please contact **Robert Stagliano, Project Manager** for further instructions at 754-321-1531 or email to [robert.stagliano@browardschools.com](mailto:robert.stagliano@browardschools.com).

Submit your estimate proposal to Denis Herrmann, Construction Purchasing Agent at the above address within ten (10) days of your receipt of this Estimating Order and copy the Project Manager.

|   |   |
|---|---|
| Time for Completion of the Work         | 30 Consecutive Calendar Days from the date stipulated on the Notice to Proceed for Substantial Completion |
| Time for Completion of Final Completion | 30 Consecutive Calendar Days from Substantial Completion  |

If you have any questions, please contact Denis Herrmann, Construction Purchasing Agent at 754- 321-0505 or email to [Denish@browardschools.com](mailto:Denish@browardschools.com).

Sincerely,

**Shelley Meloni  
Task Assigned Chief Facilities & Construction Officer Office of  
Facilities & Construction**

**Attachments**

- cc: **Sonja Coley, Senior Project Manager**
- Daniel Minich, Senior Project Manager**
- Robert Stagliano, Project Manager**
- Denis Herrmann, Construction Purchasing Agent**
- Philomene Tomasino, Project File**



**The School Board of Broward County, Florida  
Supply Management & Logistics Department 7720  
W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351**

**(754) 321-0505**

**Document 00800a: ESTIMATING ORDER**

Via - Fax, Email

Date: May 30, 2014

**Robert P. Kornahrens, President  
Advanced Roofing, Inc.  
1950 NW 22<sup>nd</sup> Street  
Fort Lauderdale, FL 33311**

**Facility: Riverglades Elementary School  
Number: 2891  
Project No.: P.001442  
Project Title: Tile Roof Replacement - Complete Punchlist**

Dear Mr. Kornahrens:

Please submit a cost estimate for this project utilizing the Construction Services Minor Projects Contract dated March 4, 2014 for Roofing Services. Submit your estimate in writing on the Estimating Recap Form and Project Cost Sheet. **Please contact Robert Stagliano, Project Manager for further instructions at 754-321-1531 or email to robert.stagliano@browardschools.com.**

Submit your estimate proposal to Denis Herrmann, Construction Purchasing Agent at the above address within ten (10) days of your receipt of this Estimating Order and copy the Project Manager

|   |   |
|---|---|
| Time for Completion of the Work         | 90 Consecutive Calendar Days from the date stipulated on the Notice to Proceed for Substantial Completion |
| Time for Completion of Final Completion | 30 Consecutive Calendar Days from Substantial Completion  |

If you have any questions, please contact Denis Herrmann, Construction Purchasing Agent at 754- 321-0505 or email to Denish@browardschools.com.

Sincerely,

Shelley Meloni  
Task Assigned Chief Facilities & Construction Officer Office of  
Facilities & Construction

Attachments

- cc: Sonja Coley, Senior Project Manager
- Daniel Minich, Senior Project Manager
- Robert Stagliano, Project Manager
- Denis Herrmann, Construction Purchasing Agent
- Philomene Tomasino, Project File



**The School Board of Broward County, Florida  
Supply Management & Logistics Department 7720  
W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351**

**(754) 321-0505**

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**Document 00800a: ESTIMATING ORDER**

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Via - Fax, Email

Date: May 26, 2014

**Frank O. Monti Jr., President  
Koldairo, Inc.  
4659 NW 103<sup>rd</sup> Ave  
Sunrise, FL 33351**

**Facility: Watkins Elementary School  
Number: 0511  
Project No.: P.001469  
Project Title: AC DX Building 1 Room 103F Equipment Room**

Dear Mr. Monti:

Please submit a cost estimate for this project utilizing the Construction Services Minor Projects Contract dated March 4, 2014 for Mechanical Services. Submit your estimate in writing on the Estimating Recap Form and Project Cost Sheet. Please contact Robert Stagliano, Project Manager for further instructions at 754-321-1531 or email to robert.stagliano@browardschools.com.

Submit your estimate proposal to Denis Herrmann, Construction Purchasing Agent at the above address within ten (10) days of your receipt of this Estimating Order and copy the Project Manager.

|   |   |
|---|---|
| Time for Completion of the Work         | 30 Consecutive Calendar Days from the date stipulated on the Notice to Proceed for Substantial Completion |
| Time for Completion of Final Completion | 30 Consecutive Calendar Days from Substantial Completion  |

If you have any questions, please contact Denis Herrmann, Construction Purchasing Agent at 754- 321-0505 or email to Denish@browardschools.com.

Sincerely,

**Shelley Meloni  
Task Assigned Chief Facilities & Construction Officer Office of  
Facilities & Construction**

**Attachments**

- cc: **Sonja Coley, Senior Project Manager**
- Daniel Mirich, Senior Project Manager**
- Robert Stagliano, Project Manager**
- Denis Herrmann, Construction Purchasing Agent**
- Philomene Tomasino, Project File**

**FILE COPY**



**DOCUMENT 800b: CONSTRUCTION SERVICES MINOR PROJECTS  
ESTIMATING RECAP FORM**

|   |  |   |  |
|---|--|---|--|
| <b>PROJECT NO.:</b> P.001527  |  | <b>SITE NUMBER:</b> 2221                      |  |
| <b>PROJECT NAME:</b> Reroof Building 8  |  |   |  |
| <b>SCHOOL/BUILDING NAME:</b> Atlantic Technical Center                                    |  |   |  |
| <b>SBBC's PROJECT MANAGER:</b> Jason Fair   |  |   |  |
| <b>CONTRACTOR:</b> Advanced Roofing   |  | <b>CONTRACTOR'S TELEPHONE #:</b> 954-522-6868 |  |
| <b>CONTRACTOR'S ADDRESS:</b><br>1950 NW 22 <sup>nd</sup> Street<br>Ft Lauderdale FL 33311 |  |   |  |
| <b>ACTIVITY</b>   |  |   |  |
| DEMOLITION WORK   |  | \$ 27,481.00                                  |  |
| NEW ARCHITECTURAL WORK  |  | \$ _____                                      |  |
| MECHANICAL WORK   |  | \$ 4,500.00                                   |  |
| ELECTRICAL WORK   |  | \$ _____                                      |  |
| PLUMBING WORK   |  | \$ _____                                      |  |
| SPECIALTY WORK  |  | \$ _____                                      |  |
| OTHER Roofing / Sheet Metal / Engineering, Testing & Design                               |  | \$ 186,254.00                                 |  |

|           |   |                         |
|-----------|---|-------------------------|
| <b>A.</b> | <b>The Work - Lump Sum</b>                                      | \$ 218,235.00           |
| <b>B.</b> | <b>Cost of Performance and Payment Bonds</b>                    | \$ 2,765.00             |
| <b>C.</b> | <b>Cost of Builder's Risk Insurance</b>                         | \$ Installation Floater |
| <b>D.</b> | <b>Lump Sum Proposal - Total Construction Cost (A,B, and C)</b> | \$ 221,000.00           |
| <b>E.</b> | <b>Number of days to substantial completion</b>                 | 120 <del>30</del> Days  |
| <b>F.</b> | <b>Number of days to final completion</b>                       | 90 <del>30</del> Days   |

Daniel Stokes, Vice President  
Contractor's Officer's Typed Name and Title

6/13/2014

Contractor's Officer's Signature

Date

# EXHIBIT E-2



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, FL 33351  
 (754) 321-0505

**DOCUMENT 800b: CONSTRUCTION SERVICES MINOR PROJECTS**

**ESTIMATING RECAP FORM**

|  |  |                                  |  |
|--|--|----------------------------------|--|
| <b>PROJECT NO.:</b> P.000991   |  | <b>SITE NUMBER:</b> 1661         |  |
| <b>PROJECT NAME:</b> Ventilation   |  |                                  |  |
| <b>SCHOOL/BUILDING NAME:</b> Hollywood High School                                   |  |                                  |  |
| <b>SBBC's PROJECT MANAGER:</b> Robert Stagliano                                      |  |                                  |  |
| <b>CONTRACTOR:</b> Koldaire, Inc.  |  | <b>CONTRACTOR'S TELEPHONE #:</b> |  |
| <b>CONTRACTOR'S ADDRESS:</b> 4659 NW 103 <sup>rd</sup> Avenue Sunrise, Florida 33351 |  |                                  |  |
| <b>ACTIVITY</b>  |  |                                  |  |
| DEMOLITION WORK  |  | \$ 2,500.00                      |  |
| NEW ARCHITECTURAL WORK   |  | \$ 5,000.00                      |  |
| MECHANICAL WORK  |  | \$ 20,479.00                     |  |
| ELECTRICAL WORK  |  | \$ 8,500.00                      |  |
| PLUMBING WORK  |  | \$ 1,500.00                      |  |
| SPECIALTY WORK   |  | \$                               |  |
| OTHER: Design/Engineering  |  | \$ 11,700.00                     |  |

|           |  |                    |
|-----------|--|--------------------|
| <b>A.</b> | <b>The Work - Lump Sum</b>                                     | <b>\$49,679.00</b> |
| <b>B.</b> | <b>Cost of Performance and Payment Bonds</b>                   | <b>\$ 0.00</b>     |
| <b>C.</b> | <b>Cost of Builder's Risk Insurance</b>                        | <b>\$ 0.00</b>     |
| <b>D.</b> | <b>Lump Sum Proposal - Total Construction Cost (A,B and C)</b> | <b>\$49,679.00</b> |
| <b>E.</b> | <b>Number of days to substantial completion</b>                | <b>30 Days</b>     |
| <b>F.</b> | <b>Number of days to final completion</b>                      | <b>30 Days</b>     |

Frank O. Monti Jr      President  
 Contractor's Officer's Typed Name and Title  
Frank O Monti Jr  
 Contractor's Officer's Signature

June 17, 2014  
 Date



## DOCUMENT 800b: CONSTRUCTION SERVICES MINOR PROJECTS

### ESTIMATING RECAP FORM

|   |  |  |  |
|---|--|--|--|
| <b>PROJECT NO.:</b> P.00142   |  | <b>SITE NUMBER:</b> 2891                         |  |
| <b>PROJECT NAME:</b> Tile Roof Replacement - Complete Punchlist                           |  |  |  |
| <b>SCHOOL/BUILDING NAME:</b> Riverglades Elementary School                                |  |  |  |
| <b>SBBC's PROJECT MANAGER:</b> Robert Stagliano   |  |  |  |
| <b>CONTRACTOR:</b> Advanced Roofing   |  | <b>CONTRACTOR'S TELEPHONE #:</b><br>954-522-6868 |  |
| <b>CONTRACTOR'S ADDRESS:</b><br>1950 NW 22 <sup>nd</sup> Street<br>Ft Lauderdale FL 33311 |  |  |  |
| <b>ACTIVITY</b>   |  |  |  |
| DEMOLITION WORK   |  | \$ _____   |  |
| NEW ARCHITECTURAL WORK  |  | \$ _____   |  |
| MECHANICAL WORK   |  | \$ _____   |  |
| ELECTRICAL WORK   |  | \$ _____   |  |
| PLUMBING WORK   |  | \$ _____   |  |
| SPECIALTY WORK  |  | \$ _____   |  |
| <b>OTHER</b> Roofing, Sheet Metal, Crane & Equipment, Engineering & Design & Dumps        |  | \$ 70,000.00                                     |  |

|           |  |                         |
|-----------|--|-------------------------|
| <b>A.</b> | <b>The Work - Lump Sum</b>   | \$ 70,000.00            |
| <b>B.</b> | <b>Cost of Performance and Payment Bonds</b>   | \$ N/A                  |
| <b>C.</b> | <b>Cost of Builder's Risk Insurance</b>  | \$ Installation Floater |
| <b>D.</b> | <b>Lump Sum Proposal - Total Construction Cost (A,B, and C)</b>                                  | \$ 70,000.00            |
| <b>E.</b> | <b>Number of days to substantial completion (Substantial Completion Date September 23, 2014)</b> | <b>61 Days</b>          |
| <b>F.</b> | <b>Number of days to final completion</b>  | <b>91 Days</b>          |

Daniel Stokes, Vice President  
 Contractor's Officer's Typed Name and Title

6/18/2014

Date

Contractor's Officer's Signature

# EXHIBIT E-4



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, FL 33351  
 (754) 321-0505

## DOCUMENT 800b: CONSTRUCTION SERVICES MINOR PROJECTS

### ESTIMATING RECAP FORM

|   |  |  |  |
|---|--|--|--|
| PROJECT NO.: P.001469   |  | SITE NUMBER: 0511                      |  |
| PROJECT NAME: Ventilation   |  |  |  |
| SCHOOL/BUILDING NAME: Watkins Elementary School                               |  |  |  |
| SBBC's PROJECT MANAGER: Robert Stagliano                                      |  |  |  |
| CONTRACTOR: Koldaire, Inc.  |  | CONTRACTOR'S TELEPHONE #: 954-747-3690 |  |
| CONTRACTOR'S ADDRESS: 4659 NW 103 <sup>rd</sup> Avenue Sunrise, Florida 33351 |  |  |  |
| ACTIVITY  |  |  |  |
| DEMOLITION WORK   |  | \$ _____                               |  |
| NEW ARCHITECTURAL WORK  |  | \$ 5,000.00                            |  |
| MECHANICAL WORK   |  | \$ 18,200.00                           |  |
| ELECTRICAL WORK   |  | \$ 7,000.00                            |  |
| PLUMBING WORK   |  | \$ 1,800.00                            |  |
| SPECIALTY WORK  |  | \$ _____                               |  |
| OTHER: Design/Engineering   |  | \$ 6,300.00                            |  |

|    |   |             |
|----|---|-------------|
| A. | The Work - Lump Sum                                       | \$38,000.00 |
| B. | Cost of Performance and Payment Bonds                     | \$ 0.00     |
| C. | Cost of Bullder's Risk Insurance                          | \$ 0.00     |
| D. | Lump Sum Proposal - Total Construction Cost (A, B, and C) | \$38,000.00 |
| E. | Number of days to substantial completion                  | 30 Days     |
| F. | Number of days to final completion                        | 30 Days     |

Frank O. Monti Jr      President  
 Contractor's Officer's Typed Name and Title  
*Frank O Monti Jr*  
 Contractor's Officer's Signature

June 13, 2014  
 Date

The School Board of Broward County, Florida  
 Supplementary Conditions of the Contract - Estimating Recap Form  
 June 11, 2013

Document 00800b  
 Page 1 of 1

The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33381

(754) 321-0505

Document 00435: Schedule of Values

Project No. & Location No.: P001517 Site 2221  
 Project Title: Building 8 Re-roof  
 Facility Name: Atlantic Technical Center  
 Contractor: Advanced Roofing Inc.

Date Submitted: \_\_\_\_\_  
 Original Post Bid Submittal: \_\_\_\_\_

Yes No

Accompanying Requisition for Payment No.:

(FORM TO BE USED BY THE SELECTED BIDDER ONCE THEY HAVE BEEN ASSIGNED A PROJECT UNDER GSMP)

| A<br>Item No. | B<br>Project Manual Division/Section No. | C<br>Description of Work                              | D<br>Scheduled Value | E<br>Work Completed       |             | G<br>Materials Presently Stored to Date (Not in E or F) | H<br>Total Completed & Stored to Date (E-F+G) | I<br>% | J<br>Balance to Finish (D-H) | K<br>Retainage |
|---------------|--|---|----------------------|---------------------------|-------------|---|---|--------|------------------------------|----------------|
|               |  |   |                      | From Previous Application | This period |   |   |        |                              |                |
|               | Div. 0                                   | Bonds   | \$2,785.00           |                           |             |   |   |        |                              |                |
|               | Div. 1                                   | GENERAL REQUIREMENTS<br>Engineering, Testing & Design | \$7,900.00           |                           |             |   |   |        |                              |                |
|               | Div. 2                                   | SAFE WORK   |                      |                           |             |   |   |        |                              |                |
|               | 02070                                    | Minor Demolition for Remodeling                       | 327,481.00           |                           |             |   |   |        |                              |                |
|               | Div. 7                                   | THERMAL and MOISTURE PROTECTION                       |                      |                           |             |   |   |        |                              |                |
|               | 07561                                    | Modified Bitumen Roofing-Torch Application            |                      |                           |             |   |   |        |                              |                |
|               |  | Labor   | \$48,714.00          |                           |             |   |   |        |                              |                |
|               |  | Materials   | \$110,960.00         |                           |             |   |   |        |                              |                |

The School Board of Broward County, Florida  
 Schedule of Values  
 June 11, 2013

The School Board of Broward County, Florida  
 Supply Management & Logistics Department



7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

Document 00435: Schedule of Values

|         |                             |           |  |  |  |  |  |  |  |
|---------|-----------------------------|-----------|--|--|--|--|--|--|--|
| 7600    | Flashing and Sheet Metal    | 58,000.00 |  |  |  |  |  |  |  |
|         | Labor                       |           |  |  |  |  |  |  |  |
|         | Materials                   | 39,300.00 |  |  |  |  |  |  |  |
| Div. 15 | MECHANICAL                  |           |  |  |  |  |  |  |  |
| 16050   | Basic Materials and Methods | 34,500.00 |  |  |  |  |  |  |  |
|         | Recess Curb on exhaust fans |           |  |  |  |  |  |  |  |
|         | Installation of Stand       |           |  |  |  |  |  |  |  |

Contractor's Certification

According to the best of my knowledge and belief, I certify that all items and amounts shown on this certificate are correct, that all work has been performed and material supplied in full accordance with the terms and conditions of the Contract. I further certify that all just and lawful bills against the undersigned and his subcontractors for labor, materials, and equipment employed in

*[Signature]*  
 Title: President

Company Name &  
 Address:  
 Phone

The School Board of Broward County, Florida  
 Schedule of Values  
 June 11, 2013



Transmittal Cover Sheet

The School Board of Broward County Program Management Services

Date: 8/4/2014

Transmitted to (name, address, phone #, fax #): Transmitted by (Name, address, phone #, fax #)

Mickey Aviles
Facilities/URS
3775 SW 16th Street
Fort Lauderdale, FL 33312
754-321-1530

Jason Fair
Facilities/URS
3775 SW 16th Street
Fort Lauderdale, FL 33312
754-321-1533

Package Transmitted For Delivered Via Tracking Number

- for approval as requested other pickup FedEx
for your use for distribution describe mail hand delivered

Table with 3 columns: Copies, Reference, Description. Rows include Atlantic TC Building 8 Reroof, Riverside ES Accident Roof Repair, and Coconut Creek ES Safety Ventilation.

Remarks: For Shelley Meloni's review.

Signature of Jason Fair

Signed Date: 8-4-14

cc: Contact Name Company Name Copies Notes

URS Corporation
3775 SW 16th Street
Fort Lauderdale, FL 33312
Tel: 754-321-1500
Fax: 754-321-1501

URS-01646/10001... 7/12/2013



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

**Document 00435: Schedule of Values**

Project No. & Location No.: P.000991  
 Project Title: Safety/Ventilation (AC in Bldg. 1 Room 111D 7 EF234)  
 Facility Name: Hollywood Hills High School  
 Contractor: Koldaire, Inc.  
 Date Submitted: 8/11/2014  
 Original Post Bid Submittal:  Yes  No  
 Accompanying Requisition for Payment No.: 1

**(FORM TO BE USED BY THE SELECTED BIDDER ONCE THEY HAVE BEEN ASSIGNED A PROJECT UNDER CSMP)**

| A<br>Item No. | B<br>Project Manual Division/Section No. | C<br>Description of Work | D<br>Scheduled Value | E<br>Work Completed                |        | F<br>This Period | G<br>Materials Presently Stored to Date<br>(Not in E or F) | H<br>Total Completed & Stored to Date<br>(E+F+G) | I<br>% | J<br>Balance to Finish<br>(D-H) | K<br>Retainage |
|---------------|--|--------------------------|----------------------|------------------------------------|--------|------------------|--|--|--------|---------------------------------|----------------|
|               |  |                          |                      | From Previous Application<br>(E+F) | Period |                  |  |  |        |                                 |                |
| Div. 1        |  | GENERAL REQUIREMENTS     |                      |                                    |        |                  |  |  |        |                                 |                |
|               |  | Engineering              | \$11,700.00          |                                    |        |                  |  |  |        | \$11,700.00                     |                |
| Div. 2        |  | DEMOLITION               | \$2,500.00           |                                    |        |                  |  |  |        | \$2,500.00                      |                |
| Div. 3        |  | ARCHITECTURAL WORK       | \$5,000.00           |                                    |        |                  |  |  |        | \$5,000.00                      |                |
| Div. 15       |  | MECHANICAL               | \$20,479.00          |                                    |        |                  |  |  |        | \$20,479.00                     |                |
| Div. 15       |  | PLUMBING                 | \$1,500.00           |                                    |        |                  |  |  |        | \$1,500.00                      |                |
| Div. 16       |  | ELECTRICAL               | \$8,500.00           |                                    |        |                  |  |  |        | \$8,500.00                      |                |
|               |  | <b>TOTAL</b>             |                      |                                    |        |                  |  |  |        | \$49,679.00                     |                |



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

**Document 00435: Schedule of Values**

**Contractor's Certification**

According to the best of my knowledge and belief, I certify that all items and amounts shown on this certificate are correct, that all work has been performed and material supplied in full accordance with the terms and conditions of the Contract. I further certify that all just and lawful bills against the undersigned and his subcontractors for labor, materials, and equipment employed in the performance of the Work have been paid in full in accordance with the Contract's terms and conditions.

**Submitted By:** Frank O Mont Jr.  
 Company Name & Koldaire, Inc.  
 Address: 4659 NW 103 Avenue  
 Sunrise, FL 33351  
 Phone: 954-747-3690

*Frank O Mont Jr*

Signature

President

Title

Reviewer  
*[Signature]*  
 8-12-14



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

**Document 00435: Schedule of Values**

Project No. & Location No.: P.001442 2891  
 Project Title: Tile Roof Repairs  
 Facility Name: Riverglades E.S.  
 Contractor: Advanced Roofing, Inc.

Date Submitted: 9/5/2014

Original Post Bid Submittal:  Yes  No

Accompanying Requisition for Payment No.: 1

**(FORM TO BE USED BY THE SELECTED BIDDER ONCE THEY HAVE BEEN ASSIGNED A PROJECT UNDER CSMP)**

| A        | B                                   | C                        | D           | E                               |                | F  | G  | H | I                       | J         | K |
|----------|-------------------------------------|--------------------------|-------------|---------------------------------|----------------|--|--|---|-------------------------|-----------|---|
|          |                                     |                          |             | Scheduled Value                 | Work Completed |  |  |   |                         |           |   |
| Item No. | Project Manual Division/Section No. | Description of Work      |             | From Previous Application (E+F) | This Period    | Materials Presently Stored to Date (Not in E or F) | Total Completed & Stored to Date (E+F+G) | % | Balance to Finish (D-H) | Retainage |   |
|          | Div. 0                              | Overhead                 | \$3,500.00  | 0                               | 940.93         |  |  | 0 | 2559.07                 |           |   |
|          | Div. 0                              | Profit                   | \$3,500.00  | 0                               | 940.93         |  |  | 0 | 2559.07                 |           |   |
|          | 07324                               | Concrete Roofing Tiles   | \$32,948.55 | 0                               | 848.01         |  |  | 0 | 24499.54                |           |   |
|          | 07600                               | Flashing and Sheet Metal | \$30,051.45 | 0                               | 848.76         |  |  | 0 | 21563.69                |           |   |
|          |                                     | TOTALS                   | \$70,000.00 | 0                               | 18818.63       |  |  | 0 | 51181.37                |           |   |



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

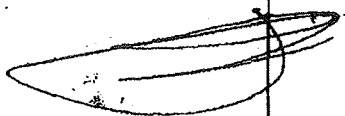
**Document 00435: Schedule of Values**

**Contractor's Certification**

According to the best of my knowledge and belief, I certify that all items and amounts shown on this certificate are correct, that all work has been performed and material supplied in full accordance with the terms and conditions of the Contract. I further certify that all just and lawful bills against the undersigned and his subcontractors for labor, materials, and equipment employed in the performance of the Work have been paid in full in accordance with the Contract's terms and conditions.

**Submitted By:**

Company Name & Address: Advanced Roofing, Inc.  
 1950 NW 22 Street  
 Fort Lauderdale, Fl. 33311  
 Phone: 954.522.6868

  
 \_\_\_\_\_  
 Signature  
 V.P.  
 \_\_\_\_\_  
 Title

The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

**Document 00435: Schedule of Values**

Project No. & Location No.: P.001469

Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)

Facility Name: Waitkins Elementary School

Contractor: Koldaire, Inc.

Date Submitted: 8/11/2014

Original Post Bid Submittal:  Yes  No

Accompanying Requisition for Payment No.: 1

**(FORM TO BE USED BY THE SELECTED BIDDER ONCE THEY HAVE BEEN ASSIGNED A PROJECT UNDER CSMP)**

| A        | B                                   | C                    | D               | E                         |                                    | F                                | G               | H       | I | J                 | K         |
|----------|-------------------------------------|----------------------|-----------------|---------------------------|------------------------------------|----------------------------------|-----------------|---------|---|-------------------|-----------|
|          |                                     |                      |                 | Work Completed            | Materials Presently Stored to Date |                                  |                 |         |   |                   |           |
| Item No. | Project Manual Division/Section No. | Description of Work  | Scheduled Value | From Previous Application | This Period                        | Total Completed & Stored to Date | (Not in E or F) | (E+F+G) | % | Balance to Finish | Retainage |
|          | DIV. 1                              | GENERAL REQUIREMENTS |                 |                           |                                    |                                  |                 |         |   |                   |           |
|          |                                     | Engineering          | \$6,300.00      |                           |                                    |                                  |                 |         |   | \$6,300.00        |           |
|          | DIV. 3                              | ARCHITECTURAL WORK   | \$5,000.00      |                           |                                    |                                  |                 |         |   | \$5,000.00        |           |
|          | DIV. 15                             | MECHANICAL           | \$18,200.00     |                           |                                    |                                  |                 |         |   | \$18,200.00       |           |
|          | DIV. 15                             | PLUMBING             | \$1,500.00      |                           |                                    |                                  |                 |         |   | \$1,500.00        |           |
|          | DIV. 16                             | ELECTRICAL           | \$7,000.00      |                           |                                    |                                  |                 |         |   | \$7,000.00        |           |
|          |                                     | <b>TOTAL</b>         |                 |                           |                                    |                                  |                 |         |   | \$38,000.00       |           |



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 Supply Management & Logistics Department  
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**Document 00435: Schedule of Values**

**Contractor's Certification**

According to the best of my knowledge and belief, I certify that all items and amounts shown on this certificate are correct, that all work has been performed and material supplied in full accordance with the terms and conditions of the Contract. I further certify that all just and lawful bills against the undersigned and his subcontractors for labor, materials, and equipment employed in the performance of the Work have been paid in full in accordance with the Contract's terms and conditions.

**Submitted By:** Frank O Mont Jr.  
 Company Name & Koldaire, Inc.  
 Address: 4659 NW 103 Avenue  
 Sunrise, FL 33351  
 Phone: 954-747-3690

*Frank O Mont Jr*  
 Signature  
 President  
 Title

Reviewed  
~~10/10/10~~ 10/10/10  
 8-12-14



# EXHIBIT G-1

ATLANTIC TECHNICAL COLLEGE - RE-ROOF BLDG 8 (P.001527) / 2021

TBC

6/17/2014

| No. | MS MEANS Line Number | Description                              | QTY    | Unit  | M/Unit | M/Unit | M/L (O&P)   | Total Incl O&P |
|-----|----------------------|--|--------|-------|--------|--------|-------------|----------------|
| 1   | *013113200200        | Project Manager                          | 2      | Week  |        |        | \$ 2,650.00 | \$ 5,300.00    |
| 2   | *013113200260        | Superintendent                           | 8      | Week  |        |        | \$ 2,475.00 | \$ 19,800.00   |
| 3   | *015419500200        | Crane Truck Mounted Hydraulic 25 Ton     | 30     | DAY   |        |        | \$ 1,475.00 | \$ 44,250.00   |
| 4   | *024119192000        | Trash Removal                            | 500    | CY    |        |        | \$ 31.50    | \$ 15,750.00   |
| 5   | *070505103720        | Roofing Demo 4 Ply with gravel           | 170    | SQ    |        |        | \$ 95.50    | \$ 16,235.00   |
| 6   | *075113400300        | Base sheet channel vented + temp         | 170    | SQ    |        |        | \$ 50.00    | \$ 8,500.00    |
| 7   | *075213102100        | APP Smooth Base Ply Flashing Torched     | 17,000 | SF    |        |        | \$ 1.75     | \$ 29,750.00   |
| 8   | *075213102200        | APP Granular Cap Sheet Torched           | 17,000 | SF    |        |        | \$ 2.00     | \$ 34,000.00   |
| 9   | *072216102150        | EPS 4" R 20                              | 30,000 | BF    |        |        | \$ 0.83     | \$ 24,900.00   |
| 10  | *075213102250        | APP Smooth Base Ply Flashing Torched     | 300    | SF    |        |        | \$ 2.47     | \$ 741.00      |
| 11  | *075213102350        | APP Granular Finish Ply Flashing Torched | 300    | SF    |        |        | \$ 2.67     | \$ 801.00      |
| 12  | *077119101800        | Gravel Stops Stainless Steel             | 400    | LF    |        |        | \$ 14.65    | \$ 5,860.00    |
| 13  | *077126101500        | Counter Flashing Stainless steel         | 20     | LF    |        |        | \$ 9.85     | \$ 197.00      |
| 14  | *077129101600        | Expansion Joints stainless steel         | 0      | LF    |        |        | \$ 24.50    | \$             |
| 15  | *077273100100        | Pitch Pockets                            | 12     | EACH  |        |        | \$ 26.50    | \$ 318.00      |
| 16  | *077123302200        | Stainless steel Gutter                   | 400    | LF    |        |        | \$ 14.05    | \$ 5,620.00    |
| 17  | *070505103470        | Roof Demo Original First Roof 4 Ply      | 0      | SQ    |        |        | \$ 95.50    | \$             |
| 18  | *070605102520        | Insulation Removal Up to 2"              | 0      | SF    |        |        | \$ 0.51     | \$             |
| 19  | *035216130020        | Lightweight Insulating Concrete          | 315    | CY    |        |        | \$ 183.00   | \$ 57,645.00   |
| 20  | *072216100110        | Temporary Roof Overlay Board 1/2"        | 17,000 | SF    |        |        | 0.71        | \$ 12,070.00   |
| 21  | *075213102200        | Temporary Roof APP Granular Torched      | 17,000 | SF    |        |        | \$ 2.00     | \$ 34,000.00   |
| 22  | *077123108100        | Stainless downspout 4" x 5"              | 220    | LF    |        |        | \$ 112.00   | \$ 24,640.00   |
| 23  | *061110245100        | Wood Nailers Treated 2"x6"               | 500    | LF    |        |        | \$ 1.91     | \$ 955.00      |
| 24  | CREW B-20A           | Plumbing Crew                            | 2      | DAILY |        |        | \$ 2,282.00 | \$ 4,584.00    |

# EXHIBIT G-2

|    |               |  |   |       |             |   |
|----|---------------|--|---|-------|-------------|---|
| 25 | CREW G-5      | Additional<br>Removal Labor<br>Two Roofs | 1 | DAILY | \$ 2,781.92 | \$ 2,781.92                               |
| 26 | CREW J-1      | Stucco Finish                            | 0 | DAILY | \$ 2,729.56 | \$  |
| 27 | CREW R-1A     | Electrician/Mechanical                   | 4 | DAILY | \$ 1,117.60 | \$ 4,470.40                               |
| 28 | *011131300100 | Engineering Fees<br>2.5%                 |   |       | \$ 9,057.18 | \$ 9,138.94                               |
|    |               |  |   |       |             | TOTAL ESTIMATE \$ 363,287.26              |
|    |               |  |   |       |             | APPLY CONTRACT MULTIPLIER 0.9 \$ 3,632.61 |
|    |               |  |   |       |             | Builder's Risk Insurance 0.26% \$ 859.49  |
|    |               |  |   |       |             | GRAND TOTAL SBBC ESTIMATE \$ 366,779.62   |
|    |               |  |   |       |             | GRAND TOTAL Advanced Roofing Estimate \$  |

Difference \$ (366,779.62)

Note: Contractor is \$0.0 higher/lower than Means Estimate



Transmittal Cover Sheet

The School Board of Broward County Program Management Services

Date: 8/4/2014

Transmitted to (Name, address, phone #, fax #): Transmitted by (Name, address, phone #, fax #)

Mickey Aviles
Facilities/URS
3775 SW 16th Street
Fort Lauderdale, FL 33312
754-321-1530

Jason Fair
Facilities/URS
3775 SW 16th Street
Fort Lauderdale, FL 33312
754-321-1533

Package Transmitted For Delivered Via Tracking Number

- for approval as requested other pickup FedEx
for your use for distribution describe mail hand delivered

Table with 3 columns: Copies, Reference, Description. Rows include Atlantic TC Building 8 Reroof, Riverside ES Accident Roof Repair, and Coconut Creek ES Safety Ventilation.

Remarks
For Shelley Meloni's review.

Signature (Handwritten)

Signed Date (8-4-14)

cc: Contact Name Company Name Copies Notes

URS Corporation
3775 SW 16th Street
Fort Lauderdale, FL 33312
Tel: 754-321-1500
Fax: 754-321-1501

# EXHIBIT G-4

SBBC

**HOLLYWOOD HILLS HS. PROVIDE VENTILATION F111D (P.000991)**

6/17/2014

| No.                                  | Item Number   | Description                               | QTY | Unit  | M/Unit | L/Unit | M/L (Q&P)    | Total Incl O&P |
|--------------------------------------|---------------|---|-----|-------|--------|--------|--------------|----------------|
| 1                                    | *01313200200  | Project Manager                           | 1   | Week  |        |        | \$ 2,650.00  | \$ 2,650.00    |
| 2                                    | *01313200260  | Superintendent                            | 3   | Week  |        |        | \$ 2,475.00  | \$ 7,425.00    |
| 3                                    | *015419500200 | Crane Truck Mounted Hydraulic 25 Ton      | 2   | DAY   |        |        | \$ 1,475.00  | \$ 2,950.00    |
| 4                                    | *024119192000 | Trash Removal                             | 40  | CY    |        |        | \$ 31.50     | \$ 1,260.00    |
| 5                                    |               | Misc Demo                                 | 3   | SF    |        |        | \$ 50.00     | \$ 150.00      |
| 6                                    |               | Misc Patch work                           | 3   | SF    |        |        | \$ 100.00    | \$ 300.00      |
| 7                                    | *237413103100 | Packaged Outdoor HVAC Equip - DX 2000 CFM | 1   | EACH  |        |        | \$ 26,800.00 | \$ 26,800.00   |
| 8                                    |               | Refrigerant pipping, etc allowance        | 1   | EACH  |        |        | \$ 5,000.00  | \$ 5,000.00    |
| 9                                    |               | Electrical Work                           | 1   | EACH  |        |        | \$ 4,000.00  | \$ 4,000.00    |
| 22                                   | *077123108100 | Stainless downspout 4" x 5"               | 0   | LF    |        |        | \$ 112.00    | \$ -           |
| 23                                   | *061110245100 | Wood Nailers Treated 2"x6"                | 0   | LF    |        |        | \$ 1.91      | \$ -           |
| 24                                   | CREW B-20A    | Plumbing Crew                             | 1   | DAILY |        |        | \$ 2,282.00  | \$ 2,282.00    |
| 25                                   | CREW G-5      | Additional Removal Labor                  | 1   | DAILY |        |        | \$ 2,781.92  | \$ 2,781.92    |
| 26                                   | CREW J-1      | Stucco Finish                             | 0   | DAILY |        |        | \$ 2,729.56  | \$ -           |
| 27                                   | CREW R-1A     | Electrician/Mechanical                    | 1   | DAILY |        |        | \$ 1,117.60  | \$ 1,117.60    |
| 28                                   | *011131300100 | Engineering Fees 2.5%                     |     |       |        |        | \$ 1,461.12  | \$ 1,728.15    |
| <b>TOTAL ESTIMATE</b>                |               |   |     |       |        |        |              | \$ 58,584.94   |
| <b>APPLY CONTRACT MULTIPLIER 0.9</b> |               |   |     |       |        |        |              | \$ -           |
| <b>Builder's Risk Insurance 0.3%</b> |               |   |     |       |        |        |              | \$ 140.27      |
| <b>GRAND TOTAL Koldaba proposal</b>  |               |   |     |       |        |        |              | \$ -           |
| <b>DIFFERENCE</b>                    |               |   |     |       |        |        |              | \$ (58,584.94) |

Note: Contractor is \$0.0 higher/lower than Means Estimate

# EXHIBIT G-5

*SABG*

## RIVERGLADES ES TILE ROOF REPLACEMENT PUNCHLIST (P.001442) 2891

6/27/2014

| No. | Item No.      | Description                              | QTY | Unit  | M/Unit | L/Unit | M/L (O & P) | Total Incl O&P |
|-----|---------------|--|-----|-------|--------|--------|-------------|----------------|
| 1   | *019119200200 | Project Manager                          | 1   | Week  |        |        | \$ 2,650.00 | \$ 2,650.00    |
| 2   | *013113200160 | Superintendent                           | 4   | Week  |        |        | \$ 2,475.00 | \$ 9,900.00    |
| 3   | *015419500200 | Crane Truck Mounted Hydraulic 25 Ton     | 0   | DAY   |        |        | \$ 1,475.00 | \$             |
| 4   | *024119192000 | Trash Removal                            | 40  | CY    |        |        | \$ 31.50    | \$ 1,260.00    |
| 5   | *070505103720 | Roofing Demo 4 Ply with gravel           | 0   | SQ    |        |        | \$ 95.50    | \$             |
| 6   | *075113400300 | Base sheet channel vented + temp         | 0   | SQ    |        |        | \$ 50.00    | \$             |
| 7   | *075213102100 | APP Smooth Base Ply Flashing Torched     | 0   | SF    |        |        | \$ 1.75     | \$             |
| 8   | *075213102200 | APP Granular Cap Sheet Torched           | 0   | SF    |        |        | \$ 2.00     | \$             |
| 9   | *072216102150 | EPS 4" R 20                              | 0   | BF    |        |        | \$ 0.85     | \$             |
| 10  | *075213102250 | APP Smooth Base Ply Flashing Torched     | 0   | SF    |        |        | \$ 2.47     | \$             |
| 11  | *075213102350 | APP Granular Finish Ply Flashing Torched | 0   | SF    |        |        | \$ 2.67     | \$             |
| 12  | *077119101800 | Gravel Stops Stainless Steel             | 0   | LF    |        |        | \$ 14.65    | \$             |
| 13  | *077126101500 | Counter Flashing Stainless steel         | 400 | LF    |        |        | \$ 9.85     | \$ 3,940.00    |
| 14  | *077129101600 | Expansion Joints stainless steel         | 0   | LF    |        |        | \$ 24.50    | \$             |
| 15  | *077273100100 | Pitch Pockets Stainless steel            | 0   | EACH  |        |        | \$ 26.50    | \$             |
| 16  | *077123302200 | Gutter                                   | 50  | LF    |        |        | \$ 14.05    | \$ 702.50      |
| 17  | *070505103470 | Roof Demo Original First Roof 4 Ply      | 0   | SQ    |        |        | \$ 95.50    | \$             |
| 18  | *070505102520 | Insulation Removal Up to 2"              | 0   | SF    |        |        | \$ 0.51     | \$             |
| 19  | *035216130020 | Lightweight Insulating Concrete          | 0   | CY    |        |        | \$ 183.00   | \$             |
| 20  | *072216100110 | Temporary Roof Overlay Board 1/2"        | 0   | SF    |        |        | 0.71        | \$             |
| 21  | *075213102200 | Temporary Roof APP Granular Torched      | 0   | SF    |        |        | \$ 2.00     | \$             |
| 22  | *077123106100 | Stainless downspout 4" x 5"              | 500 | LF    |        |        | \$ 112.00   | \$ 56,000.00   |
| 23  | *061110245100 | Wood Nails Treated 2"x6"                 | 400 | LF    |        |        | \$ 1.91     | \$ 764.00      |
| 24  | CREW B-20A    | Plumbing Crew                            | 0   | DAILY |        |        | \$ 2,282.00 | \$             |
| 25  | CREW G-5      | Additional Removal Labor Two Roofs       | 2   | DAILY |        |        | \$ 2,781.92 | \$ -5,563.84   |
| 26  | CREW J-1      | Stucco Finish                            | 0   | DAILY |        |        | \$ 2,729.56 | \$             |
| 27  | CREW R-1A     | Electrician/Mechanical                   | 0   | DAILY |        |        | \$ 1,117.60 | \$             |
| 28  | *011131300100 | Engineering Fees 2.5%                    |     |       |        |        | \$          | \$             |



# EXHIBIT G-7

SBC

**WATKINS ES - PROVIDE VENTILATION F103R (P.001469)**  
**6/17/2014**

| No.                                  | Line Number   | Description                               | QTY | Unit  | M/Unit | M/Unit | M/L (O & P)  | Total Incl O&P      |
|--------------------------------------|---------------|---|-----|-------|--------|--------|--------------|---------------------|
| 1                                    | *013113200200 | Project Manager                           | 0   | Week  |        |        | \$ 2,650.00  | \$ -                |
| 2                                    | *013113200260 | Superintendent                            | 3   | Week  |        |        | \$ 2,475.00  | \$ 7,425.00         |
| 3                                    | *015419500200 | Crane Truck Mounted Hydraulic 25 Ton      | 2   | DAY   |        |        | \$ 1,475.00  | \$ 2,950.00         |
| 4                                    | *024119192000 | Trash Removal                             | 40  | CY    |        |        | \$ 31.50     | \$ 1,260.00         |
| 5                                    |               | Misc Demo                                 | 3   | SF    |        |        | \$ 50.00     | \$ 150.00           |
| 6                                    |               | Misc Patch work                           | 3   | SF    |        |        | \$ 100.00    | \$ 300.00           |
| 7                                    | *237413103100 | Packaged Outdoor HVAC Equip - DX 2000 CFM | 1   | EACH  |        |        | \$ 26,800.00 | \$ 26,800.00        |
| 8                                    |               | Refrigerant piping, etc allowance         | 1   | EACH  |        |        | \$ 6,000.00  | \$ 6,000.00         |
| 9                                    |               | Electrical Work                           | 1   | EACH  |        |        | \$ 4,000.00  | \$ 4,000.00         |
| 24                                   | CREW B-20A    | Plumbing Crew                             | 1   | DAILY |        |        | \$ 2,282.00  | \$ 2,282.00         |
| 25                                   | CREW G-5      | Additional Removal Labor                  | 1   | DAILY |        |        | \$ 2,781.92  | \$ 2,781.92         |
| 26                                   | CREW I-1      | Stucco Finish                             | 0   | DAILY |        |        | \$ 2,729.56  | \$ -                |
| 27                                   | CREW R-1A     | Electrician/Mechanical                    | 1   | DAILY |        |        | \$ 1,117.60  | \$ 1,117.60         |
| 28                                   | *011131300100 | Engineering Fees 2.5%                     |     |       |        |        | \$ 1,419.87  | \$ 1,728.15         |
| <b>TOTAL ESTIMATE</b>                |               |   |     |       |        |        |              | <b>\$ 56,756.67</b> |
| <b>APPLY CONTRACT MULTIPLIER 0.9</b> |               |   |     |       |        |        |              | <b>\$ -</b>         |
| <b>Builder's Risk Insurance 0.2%</b> |               |   |     |       |        |        |              | <b>\$ 136.34</b>    |
| <b>GRAND TOTAL SBC ESTIMATE</b>      |               |   |     |       |        |        |              | <b>\$ 56,893.01</b> |
| <b>GRAND TOTAL Koldatre Proposal</b> |               |   |     |       |        |        |              | <b>\$ -</b>         |

**Difference \$ (56,930.98)**

Note: Contractor is \$0.0 higher/lower than Means Estimate



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd, Suite 323  
 Sunrise, FL 33351  
 (754)-321-0505

2014 JUN 23 AM 9:09

**Document 800c: Contractor's Notice To Proceed - Construction Services Minor Projects (CSMP)**

To: Advanced Roofing, Inc.  
 Address: 1950 NW 22<sup>nd</sup> Street Fort Lauderdale, FL 33311

Date of NTP Issue: 23 June 2014  
 Project Manager: Jason Fair  
 Building Permit No.:  
 Work Category for Bid No. 2014-35-FC: Roofing

Project No.: P.001527 | 2221  
 Site No. 3031

Project Title: Atlantic Technical Center Building 8 Reroof  
 Facility Name: Atlantic Technical Center  
 Project Consultant: Advanced Roofing, Inc.

Purchase Order No.: 7514010703

Purchase Order Line No.: 1

Original Purchase Order Amount: \$221,000.00

Under the provisions of your continuing term contract for Construction Services Minor Projects, you are hereby authorized to proceed with the construction services for the project referenced above. You are hereby notified that the Contract Times as stated for this Contract will commence on 23 June, 2014. You are instructed to start performing the obligations of the contract on that date and shall accomplish substantial completion of the work on or before 96 consecutive calendar days from the contract start date stated herein with a substantial completion date of 26 Sept, 2014 and a final completion date of 26 Oct, 2014.

This Notice to Proceed is subject to the following required Attachments:

Project Estimate       Project Schedule       Scope of Work       Other <sup>N/A</sup>  
 The scope of the required services is specified on the Project Estimate Order with a Contract Sum for this project of: \$ 221,000.00

|   |  |               |  |                            |  |               |  |
|---|--|---------------|--|----------------------------|--|---------------|--|
| Approved By Contractor: (Firm Name)     |  |               |  | Recommended By SBBC        |  |               |  |
| Name: Danny Stokes                      |  |               |  | Name: Sonja Coley          |  |               |  |
| Title: Vice President, Advanced Roofing |  |               |  | Title: Sr. Project Manager |  |               |  |
| Signature:                              |  | Date: 6/23/14 |  | Signature:                 |  | Date: 6/26/14 |  |
| Certified By SBBC                       |  |               |  | Approval By SBBC           |  |               |  |
| Name: Jason Fair                        |  |               |  | Name: Shelley Meloni       |  |               |  |
| Title: Project Manager, URS             |  |               |  | Title: Executive Director  |  |               |  |
| Signature:                              |  | Date: 6/25/14 |  | Signature:                 |  | Date: 6/30/14 |  |

This document is part of the Construction Services Minor Projects Agreement between The School Board of Broward County, Florida (Owner) and the Contractor and is incorporated by reference into that agreement.

Your surety is being advised of this Notice to Proceed by copy of this document and its attachments if performance and payment bonds are applicable to this project. If you have any questions concerning this Notice to Proceed, please contact the Project Manager listed above.

Cc: Chief Facilities and Construction Officer  
 Project Manager  
 Chief Building Official  
 Surety (only if there are performance and payment bonds, and attach original of performance and payment bonds)  
 Project File/Records Mgmt Section

**BELOW THIS LINE FOR USE BY CAPITAL SYSTEMS ONLY**

| Line | Fund |  | Account |          |        | Project Code* | Center   |   |   | AMOUNT |
|------|------|--|---------|----------|--------|---------------|----------|---|---|--------|
|      |      |  | Class   | Function | Object |               | Location | T | U |        |
| 01   |      |  |         |          |        |               |          |   |   |        |
| 02   |      |  |         |          |        |               |          |   |   |        |

\* Capital Only



# EXHIBIT H-2



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, FL 33351  
 (754)-321-0505

2014 JUN 27 PM 1:53

## Document 800c: Contractor's Notice To Proceed - Construction Services Minor Projects (CSMP)

To: Frank O. Monti Jr.  
 Address: 4659 NW 103<sup>rd</sup> Ave, Sunrise, FL 33351

Date of NTP Issue: 6/26/14  
 Project Manager: Robert Stagliano  
 Building Permit No.:  
 Work Category for Bid No. 2014-35-FC: Mechanical

Project No.: P.000991  
 Site No.: 1661  
 Project Title: Safety/Ventilation (AC Bldg. 1 Room 111D & EF 234)  
 Facility Name: Hollywood Hills High School  
 Project Consultant: Koldaire, Inc.

Purchase Order No.: 7514010744  
 Purchase Order Line No.: 1  
 Original Purchase Order Amount: \$49,679.00

Under the provisions of your continuing term contract for Construction Services Minor Projects, you are hereby authorized to proceed with the construction services for the project referenced above. You are hereby notified that the Contract Times as stated for this Contract will commence on June 25, 2014. You are instructed to start performing the obligations of the contract on that date and shall accomplish substantial completion of the work on or before 53 consecutive calendar days from the contract start date stated herein with a substantial completion date of August 17, 2014 and a final completion date of September 16, 2014.

This Notice to Proceed is subject to the following required Attachments:

- Project Estimate       Project Schedule       Scope of Work       Other

The scope of the required services is specified on the Project Estimate Order with a Contract Sum for this project of: \$49,679.00

|  |                         |       |         |                            |                       |       |         |
|--|-------------------------|-------|---------|----------------------------|-----------------------|-------|---------|
| Approved By Contractor: Koldaire, Inc. |                         |       |         | Recommended By SBBC        |                       |       |         |
| Name: Frank O. Monti Jr.               |                         |       |         | Name: Sonja Coley          |                       |       |         |
| Title: President                       |                         |       |         | Title: Sr. Project Manager |                       |       |         |
| Signature:                             | <i>Frank O Monti Jr</i> | Date: | 6/26/14 | Signature:                 | <i>Sonja Coley</i>    | Date: | 6/1/14  |
| Certified By SBBC                      |                         |       |         | Approval By SBBC           |                       |       |         |
| Name: Robert Stagliano                 |                         |       |         | Name: Shelley Meloni       |                       |       |         |
| Title: Project Manager, URS            |                         |       |         | Title: Executive Director  |                       |       |         |
| Signature                              | <i>Robert Stagliano</i> | Date: | 6-27-14 | Signature                  | <i>Shelley Meloni</i> | Date: | 6/27/14 |

This document is part of the Construction Services Minor Projects Agreement between The School Board of Broward County, Florida (Owner) and the Contractor and is incorporated by reference into that agreement.

Your surety is being advised of this Notice to Proceed by copy of this document and its attachments if performance and payment bonds are applicable to this project. If you have any questions concerning this Notice to Proceed, please contact the Project Manager listed above.

- cc: Shelley Meloni, Executive Director Office of Facilities & Construction  
 Robert Stagliano, Project Manager  
 Robert F. Hamberger, Chief Building Official  
 Philomene Tomasino, Document Control

### BELOW THIS LINE FOR USE BY CAPITAL SYSTEMS ONLY

| Line | Fund |  | Account |          |        | Project Code * | Center   |   |   | AMOUNT |
|------|------|--|---------|----------|--------|----------------|----------|---|---|--------|
|      |      |  | Class   | Function | Object |                | Location | T | U |        |
| 01   |      |  |         |          |        |                |          |   |   |        |
| 02   |      |  |         |          |        |                |          |   |   |        |

\* Capital Only



2014 JUN 20 PM

The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, FL 33351  
 (754)-321-0505

**Document 800c: Contractor's Notice To Proceed - Construction Services Minor Projects (CSMP)**

To: Robert P. Kornahrens, President.  
 Address: 1950 NW 22<sup>nd</sup> Street Fort Lauderdale, FL 33311

Date of NTP Issue: 6/26/14  
 Project Manager: Robert Stagliano  
 Building Permit No.:  
 Work Category for Bid No. 2014-35-FC: Roofing

Project No.: P.001442  
 Site No.: 2891  
 Project Title: Tile Roof Replacement (Complete Punch List)  
 Facility Name: Riverglades Elementary School  
 Project Consultant: Advanced Roofing, Inc.

Purchase Order No.: 7514010743  
 Purchase Order Line No.: 1  
 Original Purchase Order Amount: \$70,000.00

Under the provisions of your continuing term contract for Construction Services Minor Projects, you are hereby authorized to proceed with construction services for the project referenced above. You are hereby notified that the Contract Times as stated for this Contract will commence on June 25, 2014. You are instructed to start performing the obligations of the contract on that date and shall accomplish substantial completion of the work on or before 54 consecutive calendar days from the contract start date stated herein with a substantial completion date of August 18, 2014 and a final completion date of September 17, 2014.

This Notice to Proceed is subject to the following required Attachments:

- Project Estimate       Project Schedule       Scope of Work       Other

The scope of the required services is specified on the Project Estimate Order with a Contract Sum for this project of: \$70,000.00

|  |  |               |  |                            |  |              |  |
|--|--|---------------|--|----------------------------|--|--------------|--|
| Approved By Contractor: Advanced Roofing, Inc. |  |               |  | Recommended By SBBC        |  |              |  |
| Name: Daniel Stokes                            |  |               |  | Name: Sonja Coley          |  |              |  |
| Title: Vice President                          |  |               |  | Title: Sr. Project Manager |  |              |  |
| Signature:                                     |  | Date: 6/26/14 |  | Signature:                 |  | Date: 7/1/14 |  |
| Certified By SBBC                              |  |               |  | Approval By SBBC           |  |              |  |
| Name: Robert Stagliano                         |  |               |  | Name: Shelley Meloni       |  |              |  |
| Title: Project Manager                         |  |               |  | Title: Executive Director  |  |              |  |
| Signature:                                     |  | Date: 6-30-14 |  | Signature:                 |  | Date: 7/2/14 |  |

This document is part of the Construction Services Minor Projects Agreement between The School Board of Broward County, Florida (Owner) and the Contractor and is incorporated by reference into that agreement.

Your surety is being advised of this Notice to Proceed by copy of this document and its attachments if performance and payment bonds are applicable to this project. If you have any questions concerning this Notice to Proceed, please contact the Project Manager listed above.

- cc: Shelley Meloni, Executive Director Office of Facilities & Construction  
 Robert Stagliano, Project Manager  
 Robert F. Hamberger, Chief Building Official  
 Philomene Tomasino, Document Control

**BELOW THIS LINE FOR USE BY CAPITAL SYSTEMS ONLY**

| Line | Fund |   | Account |          |        | Project |          | Center |   |          | AMOUNT |
|------|------|---|---------|----------|--------|---------|----------|--------|---|----------|--------|
|      |      | * | Class   | Function | Object | Code *  | Location | I      | C | Activity |        |
| 01   |      |   |         |          |        |         |          |        |   |          |        |
| 02   |      |   |         |          |        |         |          |        |   |          |        |

\* Capital Only



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, FL 33351  
 (754)-321-0505

**Document 800c: Contractor's Notice To Proceed - Construction Services Minor Projects (CSMP)**

To: Frank O. Monti Jr.  
 Address: 4659 NW 103<sup>rd</sup> Ave, Sunrise, FL 33351

Date of NTP Issue: 6/26/14  
 Project Manager: Robert Stagliano  
 Building Permit No.:  
 Work Category for Bid No. 2014-35-FC: Mechanical

Project No.: P.001469  
 Site No.: 0511  
 Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)  
 Facility Name: Watkins Elementary School  
 Project Consultant: Koldaire, Inc.

Purchase Order No.: 7514010745  
 Purchase Order Line No.:  
 Original Purchase Order Amount: \$38,000.00

Under the provisions of your continuing term contract for Construction Services Minor Projects, you are hereby authorized to proceed with the construction services for the project referenced above. You are hereby notified that the Contract Times as stated for this Contract will commence on June 25, 2014. You are instructed to start performing the obligations of the contract on that date and shall accomplish substantial completion of the work on or before 53 consecutive calendar days from the contract start date stated herein with a substantial completion date of August 17, 2014 and a final completion date of September 16, 2014.

This Notice to Proceed is subject to the following required Attachments:

- Project Estimate       Project Schedule       Scope of Work       Other

The scope of the required services is specified on the Project Estimate Order with a Contract Sum for this project of: \$49,679.00

|  |                           |       |         |                            |                       |       |         |
|--|---------------------------|-------|---------|----------------------------|-----------------------|-------|---------|
| Approved By Contractor: Koldaire, Inc. |                           |       |         | Recommended By SBBC        |                       |       |         |
| Name: Frank O. Monti Jr.               |                           |       |         | Name: Sonja Coley          |                       |       |         |
| Title: President                       |                           |       |         | Title: Sr. Project Manager |                       |       |         |
| Signature:                             | <i>Frank O. Monti Jr.</i> | Date: | 6/26/14 | Signature:                 | <i>Sonja Coley</i>    | Date: | 6/11/14 |
| Certified By SBBC                      |                           |       |         | Approval By SBBC           |                       |       |         |
| Name: Robert Stagliano                 |                           |       |         | Name: Shelley Meloni       |                       |       |         |
| Title: Project Manager, URS            |                           |       |         | Title: Executive Director  |                       |       |         |
| Signature                              | <i>Robert Stagliano</i>   | Date: | 6/27/14 | Signature                  | <i>Shelley Meloni</i> | Date: | 7/2/14  |

This document is part of the Construction Services Minor Projects Agreement between The School Board of Broward County, Florida (Owner) and the Contractor and is incorporated by reference into that agreement.

Your surety is being advised of this Notice to Proceed by copy of this document and its attachments if performance and payment bonds are applicable to this project. If you have any questions concerning this Notice to Proceed, please contact the Project Manager listed above.

cc: Shelley Meloni, Executive Director Office of Facilities & Construction  
 Robert Stagliano, Project Manager  
 Robert F. Hamberger, Chief Building Official  
 Philomene Tomasino, Document Control

**BELOW THIS LINE FOR USE BY CAPITAL SYSTEMS ONLY**

| Line | Fund |   | Account |          | Project |       | Center   |   |   | AMOUNT |
|------|------|---|---------|----------|---------|-------|----------|---|---|--------|
|      |      | * | Class   | Function | Object  | Code* | Location | T | U |        |
| 01   |      |   |         |          |         |       |          |   |   |        |
| 02   |      |   |         |          |         |       |          |   |   |        |

\* Capital Only

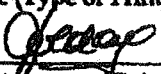
|  |   |
|--|---|
| <p><i>The School Board of Broward County, Florida</i><br/> <b>The Building Department</b><br/>                 Robert F. Hamberger, <i>Chief Building Official</i></p> | <p><b>RECEIVED</b></p> <p>OCT 24 2014</p> <p>BUILDING DEPARTMENT<br/>BCPS</p> |
|--|---|

**CERTIFICATE OF COMPLETION**

|  |   |
|--|---|
| Project: Safety/Ventilation (AC in Bldg.1 Rm 103F) | Project Number: P.001469 / 0511           |
| Facility: Watkins Elementary School                | Project Manager: Robert Stagliano         |
| Contractor: Koldaire, Inc.                         | Consultant: JALRW Engineering Group, Inc. |
| Permit Number: 1005110020                          | Date: 10/13/14                            |

As project (  Architect  Engineer ), I have inspected this project, and in my considered professional opinion, the work required by the contract for this project has been completed in accordance with approved contract documents. I have further determined that the safety systems utilized in conjunction with the scope of work are functioning satisfactorily. This project is in compliance with statutes, rules and codes affecting the health and safety of its occupants to the extent that is governed by the contract scope.

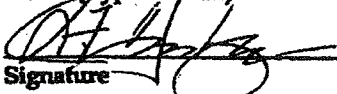
Architect or Engineer of Record:

|   |                 |                  |
|---|-----------------|------------------|
| <u>VICTOR AYEDANO</u>   | <u>PE42459</u>  | <u>2/28/2005</u> |
| Name (Type or Print)  | License #       | Exp. Date        |
|        | <u>10/13/14</u> |                  |
| Signature <input type="checkbox"/> Architect <input checked="" type="checkbox"/> Engineer | Date            |                  |

Contractor:

|                        |                   |                 |
|------------------------|-------------------|-----------------|
| <u>Koldaire, Inc.</u>  | <u>CAC1814948</u> | <u>08/31/16</u> |
| Name (Type or Print)   | License #         | Exp. Date       |
| <u>Frank LeMonte J</u> |                   |                 |

Building Official:

|   |                 |                 |
|---|-----------------|-----------------|
| <u>ROBERT HAMBERGER</u>   | <u>B01112</u>   | <u>11/30/15</u> |
| Name (Type or Print)  | License #       | Exp. Date       |
|  | <u>10/27/14</u> |                 |
| Signature   | Date            |                 |

|   |
|---|
| <p>2301 NW 26<sup>th</sup> Street, Bldg. 9, Fort Lauderdale, Florida 33311<br/>                 Phone: 754-321-4810 Fax: 754-321-3389 Form BD 105</p> |
|---|

The School Board of Broward County, Florida  
**The Building Department**  
 Robert F. Hamberger, Chief Building Official

RECEIVED

SEP 16 2014

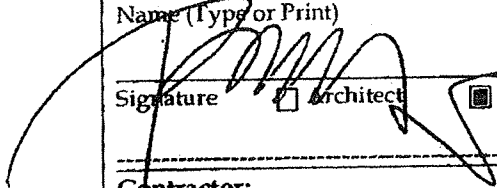
BUILDING DEPARTMENT  
 BCFS

**CERTIFICATE OF COMPLETION**

|   |   |
|---|---|
| Project: Tile Roof                      | Project Number: P.001442 / 2891                       |
| Facility: Riverglades Elementary School | Project Manager: Robert Stagliano                     |
| Contractor: Advanced Roofing, Inc.      | Consultant: Atlantic & Caribbean Roof Consulting, LLC |
| Permit Number: 1446                     | Date: 9/9/14  |

As project (  Architect  Engineer ), I have inspected this project, and in my considered professional opinion, the work required by the contract for this project has been completed in accordance with approved contract documents. I have further determined that the safety systems utilized in conjunction with the scope of work are functioning satisfactorily. This project is in compliance with statutes, rules and codes affecting the health and safety of its occupants to the extent that is governed by the contract scope.

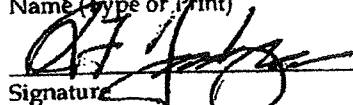
Architect or Engineer of Record:

THOMAS J. TWOMEY P.E. 25626 2/28/15  
 Name (Type or Print) License # Exp. Date  
 9/9/14  
 Signature  Architect  Engineer Date

Contractor:

Advanced Roofing, Inc. CC 024413 8/31/2016  
 Name (Type or Print) License # Exp. Date  


Building Official:

Robert Hamberger BU1112 11/30/15  
 Name (Type or Print) License # Exp. Date  
 9-17-14  
 Signature Date

2301 NW 26<sup>th</sup> Street, Bldg. 9, Fort Lauderdale, Florida 33311  
 Phone: 754-321-4810 Fax: 754-321-3389 Form BD 105



**The School Board of Broward County, Florida  
Supply Management & Logistics Department  
7720 W. Oakland Park Blvd., Suite 323  
Sunrise, Florida 33351**

**EXHIBIT I-1**

**(754) 321-0505**

**Document 00910: Addendum**

**To: All Prospective Bidders**

**Addendum**

**No.: 1 Date: 10/16/13**

**Project No: 2014-35-FC**  
**Project Title: Construction Services Minor Projects (CSMP)**  
**Facility Name: Various Locations**

The following clarifications, amendments, additions, deletions, revisions and modifications form a part of the proposed Contract Documents and change the original bidding documents only in the manner and to the extent stated.

Receipt of this Addendum must be acknowledged by inserting its number and date on the Proposal Form. Failure to do so may subject the Bidder to disqualification. The bidder must also sign and return this document to the printer listed below.

**NOTE:** Addenda may be obtained at the following location upon the payment of the cost of the hardcopy set of the Addenda with any applicable Attachments:

‘Reprografia’, Division of Thomas Reprographics  
 801 N. Andrews Ave.  
 Fort Lauderdale, FL 33311  
 Hours of Operation: Monday through Friday 8:00 am – 5:30 pm  
 Phone: (954) 525-0157 Fax: (954) 525-0387  
 E-MAIL [cad@reprografia.com](mailto:cad@reprografia.com)

**Bidder's Acknowledgement of Receipt of Addendum (Bidder must sign & return to Printer)**

**Bidder's Firm Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Authorized Representative:** \_\_\_\_\_ (Print)

**Authorized Representative:** \_\_\_\_\_ (Signature)

**Distribution: 1. Project Consultant-2. Construction Contracts Section 3. Senior Project Manager 4. Project File**

# EXHIBIT I-1

**Changes to the Project Manual:**

1. Refer to Document 00200 – Instructions to Bidders, Document BDBP-400-04 – Shop Drawings and Product Approvals Procedure:  
**ADD**, as an attachment to Document 00200 – Instructions to Bidders, the attached Document BDBP-400-04 -- Shop Drawings and Product Approvals Procedure in its entirety to the Project Manual; and revise the Table of Contents accordingly.
2. Refer to Document 00467 - Supplier Diversity & Outreach Program Requirements:  
**ADD** the attached “Document 00467 – Supplier Diversity & Outreach Program Requirements” in its entirety to the Project Manual; and revise the Table of Contents accordingly.
3. Refer to Document 00520 – Form of Agreement, Article 10 – General Provisions, paragraph 10.02.01:  
 In the second sentence, **REVISE** the words “Office of Facilities and Construction” to read “Supply Management & Logistics Dept.”

**Attachments to the Addendum:**

4. Document BDBP-400-04 – Shop Drawings and Product Approvals Procedure (3 pages).
5. Document 00467 – Supplier Diversity & Outreach Program Requirements (8 pages).
6. Attendee Log (Sign-In Sheet) for September 20, 2013, Mandatory Pre-Bid Meeting (6 pages).

|                      |  |                                  |          |
|----------------------|--|----------------------------------|----------|
| Recommended:         | <i>N/A</i>                                   |                                  |          |
|                      | (Project Consultant's Name)                  | (Project Consultant's Signature) | (Date)   |
| Reviewed & Approved: | <i>N/A</i>                                   |                                  |          |
|                      | (Project Manager's Name)                     | (Project Manager's Signature)    | (Date)   |
| Issued:              | Eileen Hunt<br>Construction Purchasing Agent | <i>Eileen Hunt</i>               | 10/16/13 |
|                      | (Contracts Department)                       | (Contracts Department Signature) | (Date)   |

Distribution: 1. ~~Project Consultant~~ 2. Construction Contracts Section 3. Senior Project Manager 4. Project File

**Document 00467**

**SUPPLIER DIVERSITY & OUTREACH PROGRAM  
REQUIREMENTS**

**1. M/WBE PARTICIPATION REQUIREMENT**

The School Board of Broward County, Florida (SBBC) is committed to ensuring the awarding of construction subcontracts to minority and women businesses. In accordance with Florida Statute 1001.41(1) and (2), and the School Board Policy 7007, the Supplier Diversity & Outreach Program (SDOP) requires that all projects shall have M/WBE subcontracting goals and that Contractors awarded work on such projects fully participate in the SDOP. Compliance with the requirements of this Document 00467 is **mandatory**.

**The M/WBE Participation Goal for the General Contractor shall be 25 percent or more.**

**The M/WBE Participation Goal for all other Contractors shall be 10 percent or more.**

**2. ENFORCEMENT**

Monthly Applications for Payment shall be submitted and must include completed M/WBE Utilization Reports. The SDOP will closely monitor these reports to verify that the M/WBE percentage goals are being met and maintained for the duration of the project. Compliance with this procedure will be **strictly enforced**. Payment verification will be closely monitored. If the Contractor fails to comply with this provision it will be considered in default of its contract.

**3. DEFINITIONS:**

The following terms shall have the stated meanings (the definitions shall not apply outside of this Document where inconsistent with those stated elsewhere in the Bidding Documents).

A. Bidder: An individual, firm, partnership, corporation, LLC or combination thereof submitting a bid to perform the work as the Prime Contractor.

B. Minority/Women Business Enterprise (M/WBE):

1. Any legal entity other than a joint venture, which is organized to engage in commercial transactions and which is at least 51 percent owned and controlled by minority persons. Minority persons being citizens or lawful permanent residents of the United States and who are:

a. An African American, a person having origins in any of the black racial groups of Africa;









The School Board of Broward County, Florida  
 Supplier Diversity & Outreach Program  
 Minority/Women Business Enterprise (M/WBE)  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351 Ph. (754) 321-0550 Fax (754) 321-0934

**Document 00485: Monthly M/WBE Subcontractors Utilization Report**

Project No: P.000991

Project Title: Safety/Ventilation (AC Bldg. 1 Room 111D & EF234)

Facility Name: Hollywood Hills High School

Date Submitted: 10/21/14

Reporting Period: From: 10/01/14 To: 10/31/14

M/WBE % Goal: 25 %

This report is required by The School Board of Broward County, Florida. Failure to comply may result in The School Board of Broward County, Florida commencing proceedings to impose sanctions on the Contractor, in addition to pursuing any other available legal remedy. Sanctions may include the withholding of payments for work committed to M/WBE participants, and a negative recommendation to award further contracts bid by The School Board of Broward County, Florida.

**Contractor's Information**

| Pre-Construction Conference | Contract Amount | Change Order | Minority/Women Goal | Date of Notice To Proceed | Scheduled Substantial Completion-Date | Date Completed |
|-----------------------------|-----------------|--------------|---------------------|---------------------------|---------------------------------------|----------------|
| 8/21/14                     | 49,679.00       | \$0          | 21%                 | 6/26/14                   | 8/18/14                               |                |

**Minority/Women Business Enterprise Subcontractor's Opportunities**

| Name of Subcontractor   | Subcontract Amount | Work Description | Amount Drawn Subcontract | Amount Paid To Date | Start Date | Scheduled Completion Date | M/WBE Current Status (Active/Terminated) |
|-------------------------|--------------------|------------------|--------------------------|---------------------|------------|---------------------------|--|
| JALRW Engineering Group | \$10,700.00        | Engineering      | \$10,700.00              | \$10,700.00         | 6/25/14    |                           | MBE - Active                             |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |

**Submitted By:**

Company Name & Address: Koldaire, Inc.  
 4659 NW 103 Avenue  
 Sunrise, FL 33351  
 Phone: 954-747-3690  
 FAX: 954-747-3679

*Frank U. Nardi*

Signature

President

Title

For M/WBE Office Use Only



The School Board of Broward County, Florida  
 Supplier Diversity & Outreach Program  
 Minority/Women Business Enterprise (M/WBE)  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351  
 Ph. (754) 321-0550 Fax (754) 321-0934

**Document 00485: Monthly M/WBE Subcontractors Utilization Report**

Project No: P.001469  
 Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)  
 Facility Name: Watkins Elementary School  
 Date Submitted: 9/26/14  
 Reporting Period: From: 09/16/14 To: 09/30/14  
 M/WBE % Goal: 25 %

This report is required by The School Board of Broward County, Florida. Failure to comply may result in The School Board of Broward County, Florida commencing proceedings to impose sanctions on the Contractor, in addition to pursuing any other available legal remedy. Sanctions may include the withholding of payments for work committed to M/WBE participants, and a negative recommendation to award further contracts bid by The School Board of Broward County, Florida.

**Contractor's Information**

| Pre-Construction Conference | Contract Amount | Change Order | Minority/Women Goal | Date of Notice To Proceed | Scheduled Substantial Completion Date | Date Completed |
|-----------------------------|-----------------|--------------|---------------------|---------------------------|---------------------------------------|----------------|
| 8/20/14                     | 38,000.00       | \$0          | 14%                 | 6/26/14                   | 9/25/14                               |                |

**Minority/Women Business Enterprise Subcontractor's Opportunities**

| Name of Subcontractor   | Subcontract Amount | Work Description | Amount Drawn Subcontract | Amount Paid To Date | Start Date | Scheduled Completion Date | M/WBE Current Status (Active/Terminated) |
|-------------------------|--------------------|------------------|--------------------------|---------------------|------------|---------------------------|--|
| JALRW Engineering Group | \$5,300.00         | Engineering      | \$5,300.00               | \$0                 | 6/25/14    |                           | MBE - Active                             |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |
|                         |                    |                  |                          |                     |            |                           |  |





**Submitted By:**

Company Name & Address: Koldaire, Inc.  
 4659 NW 103 Avenue  
 Sunrise, FL 33351  
 Phone: 954-747-3690  
 FAX: 954-747-3679

*Jack V. Morris*  
 Signature

President  
 Title

For M/WBE Office Use Only

From:  **Colleen M. Robbs** Tuesday, November 18, 2014 9:35:07 AM   
Subject: Re: Advanced Roofing, Inc. - M/WBE Certified Vendor?  
To:  **Robert Goode**  
Cc:  **Gerardo Usallan**

**Robert Goode on Friday, November 14, 2014 at 3:21 PM -0500 wrote:**

Hi Ms. Robbs, I was reviewing your list of certified M/WBE vendors (Updated June 2014) on your web site and I was unable to find the Advanced Roofing, Inc. listed in any category as a certified firm. Could you verify for me, per your current records, that I am correct in determining that Advanced Roofing, Inc. is not presently a certified M/WBE firm with the SBBC. Thanks, Bob

Robert L. Goode  
Manager, Facility Audits  
Office: 754-321-2407  
Fax: 754-321-2719  
[robert.goode@browardschools.com](mailto:robert.goode@browardschools.com)

The information transmitted is privileged and confidential. It is intended solely for the review and use of the intended recipient. Any other review or distribution of this communication is strictly prohibited. If you have received this electronic document in error, please destroy it immediately.

Under Florida law, e-mail addresses, and all communications, including e-mail communications, made or received in connection with the transaction of School Board business are public records, which must be retained as required by law and must be disclosed upon receipt of a public records request, except as may be excluded by federal or state laws. If you do not want your e-mail address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

Good Morning Mr. Goode,  
  
Our records do not show that Advanced Roofing is certified as an M/WBE firm with the School Board of Broward County.  
  
If you have any questions, please let me know.  
Thank you  
  
Colleen M. Robbs  
Supplier Diversity & Outreach Program Coordinator

## ARTICLE 42. CONTRACTOR'S INSURANCE.

### **General Insurance Requirements:**

- 42.01 The Contractor shall not provide any services under this contract until the Contractor has obtained all insurances required hereunder and such insurances have been approved by the Owner. Owner may withhold payments due to Contractor in accordance with this Contract or terminate or suspend this contract with all costs or expenses associated with same to be paid by Contractor in the event Contractor fails to comply with any requirement in the Contract regarding insurance.
- 42.02 Performance Bond and Materials and Payment Bond are required on any single project costing two hundred thousand dollars (\$200,000) or more. Each bond shall equal to one hundred percent (100%) of the single project amount for projects in excess of two hundred thousand dollars (\$200,000) or more, and shall be with a surety insurer authorized to do business in Florida and complying with Section 255.05, F.S., as amended.
- 42.03 The Contractor shall furnish certificates of insurance to the Owner for review within ten (10) days after award and shall maintain the required insurance at all times during the term of this contract.
- 42.04 All insurance policies shall be issued by companies authorized to do business under the laws of the State of Florida. All insurance companies providing policies required under this contract shall have at least an "A-" rating and a financial rating not less than VI in the current A.M. Best Manual or hold a Moody's Investors Service Financial Strength of "Aa3" or better.
- 42.05 All certificates of insurance shall be in the form as approved by Insurance Standards Office (ISO), unless approved by Owner's Designated Risk Management Administrator and such certificates shall clearly indicate that the Contractor has obtained insurance of the type, amount and classification required by these provisions, in excess of any pending claims. No material change or cancellation of the insurance shall be effective without a thirty (30) day prior written notice to and approval by the Owner's Designated Risk Management Administrator.
- 42.06 The Contractor shall verify that all subcontractors utilized in conjunction with all services provided under this contract shall maintain insurance of the type, amount, and classification required by these provisions.
- 42.07 Neither approval by the Owner, nor failure to disapprove the insurance provided by the Contractor shall relieve the Contractor of full responsibility to provide the insurance as required by this contract.
- 42.08 All insurance policies required under this contract shall be endorsed to be primary of all other valid and collectable coverages maintained by the Owner. The Owner shall be named as an additional insured under the General Liability policy.
- 42.09 **Insurance Provider and Surety:** In the event that any insurance provider, including but not limited to performance and payment bond surety companies, is

# EXHIBIT J

downgraded from A-VI rating by AM Best or Aa3 rating by Moody's Investor Service, or has an order of liquidation entered against it in any jurisdiction, Contractor shall furnish a replacement insurance product, insurance policy or surety bond, that satisfies the requirements of this Agreement within fifteen (15) days of receipt of written notice from Owner or from the time Contractor becomes aware of the downgrade or order of liquidation whichever is sooner.

- 42.10 Contractor and Surety shall have a continuing obligation to insure that all insurance or surety requirements are satisfied throughout the construction of the project and until all post completion obligations; including punch list and warranty requirements are completed or expire.

## Insurance Required:

- 42.11 **Commercial General Liability Insurance:** The Contractor shall maintain Comprehensive General Liability Insurance, including Products & Completed Operations, Personal and Bodily Injury, and Contractual Liability, to cover the indemnification language set forth herein. Limits shall not be less than \$2,000,000 per occurrence; \$2,000,000 general aggregate. Products Completed Operations aggregate shall not be less than \$2,000,000. The Owner, its members, officers, employees and agents shall be named as an Additional Insured.

- 42.12 **Owners and Contractors Protective Liability Insurance:** The Contractor shall maintain Owners and Contractors Protective Liability Insurance with limits of not less than \$1,000,000 per occurrence and \$2,000,000 aggregate.

- 42.13 **Automobile Liability Insurance:** The Contractor shall maintain Automobile Liability Insurance covering all Owned, Non-Owned and Hired vehicles in the amount of not less than One Million Dollars (\$1,000,000) per occurrence Combined Single Limit for Bodily Injury and Property Damage and shall not be any less restrictive than the standard ISO Business Auto Policy CA 00 01. In the event the Awardee does not own any vehicles, we will accept hired and non-owned coverage for \$1,000,000 Combined Single Limits and we will require an affidavit signed by the Awardee indicating the following:

(Insured's Name) does not own any vehicles. In the event we acquire any vehicles throughout the term of this agreement, (Insured's Name) agrees to provide proof of "Any Auto" coverage effective date of acquisition.

- 42.14 **Workers' Compensation Insurance:** The Contractor shall maintain Workers' Compensation Insurance in accordance with Florida Statutory Limits and Employers Liability Insurance with a limit of not less than Five Hundred Thousand \$500,000/\$500,000/\$500,000 (each accident/disease-each employee/disease-policy limit).
- 42.15 **Builders' Risk/Installation Floater Insurance:** The Contractor shall carry Builders' Risk Insurance for the perils of fire, vandalism, malicious mischief, windstorm, hurricane, theft, building collapse in addition to perils identified within the extended coverage. Insurance limits shall be insured in the amount of one hundred percent (100%) of the contract value to include both hard and soft costs. Such policies shall be written to protect the Contractor and Owner as their interest

# EXHIBIT J

may appear. This coverage shall not be lapsed or cancelled due to partial occupancy by the Owner prior to final acceptance of the Project.

42.16 **Insurance Warranty Period:** All Insurance policies, including Owners and Contractors Protective Liability Insurance, with the exception of Builders Risk Insurance, must remain in effect during performance of the work and for a period of one (1) year after Certificate of Final Inspection (OEF 209) which has been signed by the Chief Building Official /certified inspector. Builders' Risk Insurance shall not be required after receipt of the Certificate of Occupancy (OEF 110B), signed by the Chief Building Official /certified inspector.

42.17 **Certificate of Insurance Requirements:** Prior to the commencement of any work, as evidence of required coverage, Awardee must provide a Certificate of Insurance to School Board of Broward County, Florida's Risk Management Department for approval. Certificates should be faxed to The School Board of Broward County, Florida, Risk Management Department Certificate Tracking System at 1-866-897-0425.

42.17.1 Liability Policies are to contain the following provisions. In addition, the following wording must be included on the Certificate of Insurance:

42.17.1.1 The School Board of Broward County, Florida, its members, officers, employees and agents are added as additional insured. The endorsement # is \_\_\_\_\_.

42.17.1.2 All liability policies are primary of all other valid and collectable coverage maintained by the School Board of Broward County, Florida.

42.17.1.3 Contractual liability is included in the General Liability policy.

42.17.1.4 Builder's Risk/Installation Floater policy must contain the following wording and appear on the certificate: Builder's Risk limits are insured at 100% of the contract value and include both hard and soft costs. Please include the Project Number and Project Name on the Certificate of Insurance.

## **ARTICLE 43. INSPECTION OF CONTRACTOR RECORDS BY OWNER.**

43.01 Contractor shall establish and maintain books, records and documents (including electronic storage media) sufficient to reflect all income and expenditures of funds provided by SBBC under this Agreement. All Contractor's Records, regardless of the form in which they are kept, shall be open to inspection and subject to audit, inspection, examination, evaluation and/or reproduction, during normal working hours, by SBBC's agent or its authorized representative to permit SBBC to evaluate, analyze and verify the satisfactory performance of the terms and conditions of this Agreement and to evaluate, analyze and verify any and all invoices, billings, payments and/or claims submitted by Contractor or any of Contractor's payees pursuant to this Agreement. Contractor's Records subject to examination shall include, without limitation, those records necessary to evaluate and verify direct and indirect costs (including overhead allocations) as they may apply to costs associated with, this Agreement. Contractor's Records subject to this section shall include any and all documents pertinent to the evaluation, analysis, verification and





The School Board of Broward County, **EXHIBIT K**  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

(754) 321-0505

**Document 00510: Notice of Award**

**Date:**

**To:**

Company Name  
& Address:

**Pick Up: :**

Please be informed that by action of The School Board of Broward County, Florida, at its meeting on \_\_\_\_\_ a contract has been awarded to you for the project named below in the amount of \_\_\_\_\_.

Project No: **2014-35-FC**  
 Project Title: **Construction Services Minor Projects (CSMP)**  
 Facility Name: **Various Locations**

Pursuant to Document 00200, Instructions to Bidders, the contract must be executed in quadruplicate by your firm (with submittal of executed signature pages in quadruplicate, the required certificates of insurance, and other post-award information listed below in quadruplicate) within 20 calendar days from the date of your receipt (as established by delivery receipts or registered mail) of this Notice of Award.

Your office will be contacted if a formal contract signing ceremony is necessary which will take place at:

**Supply Management & Logistics Department**  
**7720 W. Oakland Park Blvd., Suite 323**  
**Sunrise, FL 33351**  
**Tel: (754) 321-0505**  
**Fax: (754) 321-0534**

If your firm is a Corporation, please ensure that your corporate President and Secretary attend the contract signing ceremony and have your corporate seal available for executing the contract documents.

The following documents are required in the bidding documents and must be executed and submitted in order to process your contract:

| <b>Number</b> | <b>Document Title</b>   |
|---------------|---|
| 00450         | Request for Taxpayer Identification Number and Certification  |
| 00455         | Background Screening of Contractual Personnel   |
| 00700         | Insurance Certificates indicating compliance with all coverage requirements including but not limited to General Liability, Auto Liability, Worker Compensation, Products/Completed Operations Liability, Professional Liability (If required), Builders Risk, and including listing The School Board of Broward County, Florida as additional insured. |



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 3/27/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Frank H. Furman, Inc.
1314 East Atlantic Blvd.
P. O. Box 1927
Pompano Beach FL 33061

Table with contact information and list of insurers: CONTACT NAME, PHONE (954) 943-5050, FAX (954) 943-5417, E-MAIL sandi@furmaninsurance.com, INSURER(S) AFFORDING COVERAGE including First Mercury Insurance Co, U S Fire Insurance Company (us), American Guarantee and, Bridgefield Employers Ins Co, Continental Casualty Co.

INSURED
Advanced Roofing Inc; Advanced Leasing Inc
1950 N W 22 St
Ft Lauderdale FL 33311

COVERAGES CERTIFICATE NUMBER: APR 2014 B REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

Main table with columns: INSR LTR, TYPE OF INSURANCE, ADDL SUBR INSR, WVD, POLICY NUMBER, POLICY EFF (MM/DD/YYYY), POLICY EXP (MM/DD/YYYY), LIMITS. Rows include General Liability, Automobile Liability, Umbrella Liab, Workers Compensation, and Installation Floater.

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)
Bid No. 2014-35-FC; The School Board of Broward County Construction Services Minor Projects - Various Locations; The School Board of Broward County, Florida, its Members, officers, employees and agents are named as Additional Insureds with reference to General Liability as per Endorsement # CG20100704 & CG20370704. All Liability policies are primary of all other valid and collectable coverage maintained by the School Board of Broward County, Florida.

CERTIFICATE HOLDER
The School Board of Broward County
Supply Management & Logistics Department
7720 W Oakland Park Blvd.
Suite 323
Sunrise, FL 33351

CANCELLATION
SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
AUTHORIZED REPRESENTATIVE
Dirk DeJong/CS

# EXHIBIT L-2

ATTACHMENT 4



## CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
7/14/2014

**THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.**

**IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).**

|  |  |  |  |
|--|--|--|--|
| <b>PRODUCER</b>                            |  | <b>CONTACT NAME:</b>                             |  |
| Frank H. Furman, Inc.                      |  | PHONE (A/C No. Ext): (954) 943-5050              |  |
| 1314 East Atlantic Blvd.                   |  | FAX (A/C No.): (954) 943-5417                    |  |
| P. O. Box 1927                             |  | E-MAIL ADDRESS: sandi@furmaninsurance.com        |  |
| Pompano Beach FL 33061                     |  | <b>INSURER(S) AFFORDING COVERAGE</b>             |  |
|  |  | INSURER A: First Mercury Insurance Co 10657      |  |
|  |  | INSURER B: U S Fire Insurance Company (us) 21113 |  |
|  |  | INSURER C: American Guarantee and 26247          |  |
|  |  | INSURER D: Bridgefield Employers Ins Co 10701    |  |
|  |  | INSURER E: Continental Casualty Co 20443         |  |
|  |  | INSURER F:                                       |  |
| <b>INSURED</b>                             |  | <b>NAIC #</b>                                    |  |
| Advanced Roofing Inc; Advanced Leasing Inc |  |  |  |
| 1950 N W 22 St                             |  |  |  |
| Ft Lauderdale FL 33311                     |  |  |  |

**COVERAGES**      **CERTIFICATE NUMBER: APR 2014 B**      **REVISION NUMBER:**

**THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.**

| INSR LTR | TYPE OF INSURANCE   | ADDL INSR | SUBR WVD | POLICY NUMBER                                  | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY)             | LIMITS   |
|----------|---|-----------|----------|--|-------------------------|-------------------------------------|--|
| A        | GENERAL LIABILITY   |           |          |  |                         |                                     | EACH OCCURRENCE \$ 1,000,000   |
|          | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY                                      |           |          |  |                         |                                     | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000                                    |
|          | <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR                        |           | X        | MICGL000004116501                              | 4/1/2014                | 4/1/2015                            | MED EXP (Any one person) \$ 5,000  |
|          | <input checked="" type="checkbox"/> \$7MIL Per Proj Agg   |           |          | Contractual Liability & KCU Liability Included |                         |                                     | PERSONAL & ADV INJURY \$ 1,000,000   |
|          | <input checked="" type="checkbox"/> Broad Form FD   |           |          |  |                         | GENERAL AGGREGATE \$ 2,000,000      |  |
|          | GEN'L AGGREGATE LIMIT APPLIES PER:  |           |          |  |                         | PRODUCTS - COMP/OP AGG \$ 2,000,000 |  |
|          | <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJ <input type="checkbox"/> LOC |           |          |  |                         | \$                                  |  |
| B        | AUTOMOBILE LIABILITY  |           |          |  |                         |                                     | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000                                       |
|          | <input checked="" type="checkbox"/> ANY AUTO  |           |          |  |                         |                                     | BODILY INJURY (Per person) \$  |
|          | <input checked="" type="checkbox"/> ALL OWNED AUTOS   |           |          | 1337346972                                     | 4/1/2014                | 4/1/2015                            | BODILY INJURY (Per accident) \$  |
|          | <input checked="" type="checkbox"/> HIRED AUTOS   |           |          |  |                         |                                     | PROPERTY DAMAGE (Per accident) \$  |
|          | <input checked="" type="checkbox"/> Nonown-Phy Dm   |           |          |  |                         | \$                                  |  |
| C        | <input checked="" type="checkbox"/> UMBRELLA LIAB   |           |          | AUC930367412                                   |                         |                                     | EACH OCCURRENCE \$ 10,000,000  |
|          | <input checked="" type="checkbox"/> EXCESS LIAB   |           |          | Umb is excess of all coverage incl WC          | 4/1/2014                | 4/1/2015                            | AGGREGATE \$ 10,000,000  |
|          | DED <input checked="" type="checkbox"/> RETENTIONS \$ ZERO  |           |          |  |                         |                                     | \$   |
| D        | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY   |           |          |  |                         |                                     | <input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER |
|          | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)                           |           | Y/N      | 083037231                                      | 1/1/2014                | 1/1/2015                            | E.L. EACH ACCIDENT \$ 1,000,000  |
|          | If yes, describe under DESCRIPTION OF OPERATIONS below  |           | N/A      |  |                         |                                     | E.L. DISEASE - EA EMPLOYEE \$ 1,000,000  |
| E        | INSTALLATION FLOATER  |           |          | 4016260407                                     | 4/1/2014                | 4/1/2015                            | E.L. DISEASE - POLICY LIMIT \$ 1,000,000   |
|          | \$6 WIND/HAIL DED \$1000.AOP  |           |          |  |                         |                                     | Any One Jobsite \$2,000,000  |
|          |   |           |          |  |                         |                                     | Any One Occurrence \$2,000,000   |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)**  
 Project: Atlantic Technical Center Building 8 Re-Roof; Project # P.001527; 4700 Coconut Creek Parkway, Coconut Creek, FL 33063; The School Board of Broward County, Florida, its Members, officers, employees and agents are named as Additional Insureds with reference to General Liability as per Endorsement # CG20100704 & CG20370704. All Liability policies are primary of all other valid and collectable coverage maintained by the School Board of Broward County, Florida.

|  |  |
|--|--|
| <b>CERTIFICATE HOLDER</b>  | <b>CANCELLATION</b>  |
| The School Board of Broward County<br>Supply Management & Logistics Department<br>7720 W. Oakland Park Blvd.<br>Suite 323<br>Sunrise, FL 33351 | SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|  | AUTHORIZED REPRESENTATIVE  |
|  | Dirk DeJong/CS   |

ACORD 25 (2010/05)  
INS025 (07/00/05) 01

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The ACORD name and logo are registered marks of ACORD



# CERTIFICATE OF LIABILITY INSURANCE

# EXHIBIT L-3

DATE (MM/DD/YYYY)  
7/24/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

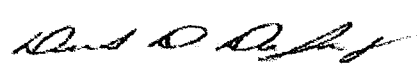
|   |  |                              |
|---|--|------------------------------|
| PRODUCER<br>Frank H. Furman, Inc.<br>1314 East Atlantic Blvd.<br>P. O. Box 1927<br>Pompano Beach FL 33061 | CONTACT NAME:                              |                              |
|   | PHONE (A/C No. Ext): (954) 943-5050        | FAX (A/C No): (954) 943-5417 |
|   | E-MAIL ADDRESS: sandi@furmaninsurance.com  |                              |
| INSURED<br>Advanced Roofing Inc; Advanced Leasing Inc<br>1950 N W 22 St<br>Ft Lauderdale FL 33311         | INSURER(S) AFFORDING COVERAGE              |                              |
|   | INSURER A: First Mercury Insurance Co      | NAIC # 10657                 |
|   | INSURER B: U S Fire Insurance Company (us) | 21113                        |
|   | INSURER C: American Guarantee and          | 26247                        |
|   | INSURER D: Bridgefield Employers Ins Co    | 10701                        |
|   | INSURER E: Continental Casualty Co         | 20443                        |
|   | INSURER F:                                 |                              |

COVERAGES CERTIFICATE NUMBER: APR 2014 B REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR  | TYPE OF INSURANCE  | ADDL INSR | SUBR WVD | POLICY NUMBER  | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS  |
|---|--|-----------|----------|--|-------------------------|-------------------------|---|
| A   | GENERAL LIABILITY  |           |          | MICGL000004116501<br>Contractual Liability &<br>XCU Liability Included | 4/1/2014                | 4/1/2015                | EACH OCCURRENCE \$ 1,000,000                                    |
|   | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY               | X         | X        |  |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000             |
|   | <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR |           |          |  |                         |                         | MED EXP (Any one person) \$ 5,000                               |
|   | <input checked="" type="checkbox"/> \$7MIL Per Proj Agg                        |           |          |  |                         |                         | PERSONAL & ADV INJURY \$ 1,000,000                              |
| <input checked="" type="checkbox"/> Broad Form PD   | GENERAL AGGREGATE \$ 2,000,000   |           |          |  |                         |                         |   |
| GEN'L AGGREGATE LIMIT APPLIES PER:  |  |           |          |  |                         |                         | PRODUCTS - COMP/OP AGG \$ 2,000,000                             |
| <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO JECT <input type="checkbox"/> LOC |  |           |          |  |                         |                         |   |
| B   | AUTOMOBILE LIABILITY   |           |          | 1337346972   | 4/1/2014                | 4/1/2015                | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000                |
|   | <input checked="" type="checkbox"/> ANY AUTO                                   | X         | X        |  |                         |                         | BODILY INJURY (Per person) \$                                   |
|   | <input checked="" type="checkbox"/> ALL OWNED AUTOS                            |           |          |  |                         |                         | BODILY INJURY (Per accident) \$                                 |
|   | <input checked="" type="checkbox"/> HIRED AUTOS                                |           |          |  |                         |                         | PROPERTY DAMAGE (Per accident) \$                               |
| <input checked="" type="checkbox"/> Nonown-Phy Dm   |  |           |          |  |                         |                         |   |
| SCHEDULED AUTOS NON-OWNED AUTOS   |  |           |          |  |                         |                         |   |
| C   | UMBRELLA LIAB  |           |          | AUC930367412<br>Umb is excess of all coverage incl WC                  | 4/1/2014                | 4/1/2015                | EACH OCCURRENCE \$ 10,000,000                                   |
|   | EXCESS LIAB  |           |          |  |                         |                         | AGGREGATE \$ 10,000,000   |
|   | DED <input checked="" type="checkbox"/> RETENTION \$ ZERO                      |           |          |  |                         |                         |   |
| D   | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY                                  |           |          | 083037231  | 1/1/2014                | 1/1/2015                | <input checked="" type="checkbox"/> WC STATU-TORY LIMITS OTH-ER |
|   | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)    | Y/N       | N/A      |  |                         |                         | E.L. EACH ACCIDENT \$ 1,000,000                                 |
|   | If yes, describe under DESCRIPTION OF OPERATIONS below                         |           |          |  |                         |                         | E.L. DISEASE - EA EMPLOYEE \$ 1,000,000                         |
|   |  |           |          |  |                         |                         | E.L. DISEASE - POLICY LIMIT \$ 1,000,000                        |
| E   | INSTALLATION FLOATER   |           |          | 4016260407   | 4/1/2014                | 4/1/2015                | Any One Jobsite \$2,000,000                                     |
|   | 5% WIND/HAIL DED\$1000.AOP   |           |          |  |                         |                         | Any One Occurrence \$2,000,000                                  |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
**RE: Riverglades Elementary School, Project # P.001442, 7400 Parkside Dr., Parkland, FL 33067; The School Board of Broward County, Florida, its Members, officers, employees and agents are named as Additional Insureds with reference to General Liability as per Endorsement # CG20100704 & CG20370704. All Liability policies are primary of all other valid and collectable coverage maintained by the School Board of Broward County, Florida.**

|  |   |
|--|---|
| <b>CERTIFICATE HOLDER</b><br><br>The School Board of Broward County<br>Supply Management & Logistics Department<br>7720 W Oakland Park Blvd.<br>Suite 323<br>Sunrise, FL 33351 | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|  | AUTHORIZED REPRESENTATIVE<br><br>Dirk DeJong/CS    |



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/10/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER**  
**BROWN & BROWN OF FLORIDA INC**  
14900 NW 79th Court Suite#200  
Miami Lakes, FL 33016-5869  
Ryan Heimbold

Phone: 305-364-7800  
Fax: 305-714-4401

|  |  |                        |
|--|--|------------------------|
| <b>CONTACT NAME:</b>                       |  | <b>FAX (A/C, No.):</b> |
| <b>PHONE (A/C, No, Ext):</b>               |  |                        |
| <b>E-MAIL ADDRESS:</b>                     |  |                        |
| <b>INSURER(S) AFFORDING COVERAGE</b>       |  | <b>NAIC #</b>          |
| INSURER A : *Amerisure Mutual Insurance Co |  | 23396                  |
| INSURER B : *Amerisure Insurance Company*  |  | 19488                  |
| INSURER C : *Chartis Specialty Ins Co      |  | 26883                  |
| INSURER D :                                |  |                        |
| INSURER E :                                |  |                        |
| INSURER F :                                |  |                        |

**INSURED**  
**Koldaire, Inc.**  
4659 NW 103 Ave  
Sunrise, FL 33351-7916

### COVERAGES

### CERTIFICATE NUMBER:

### REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE  | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS   |
|----------|--|-----------|----------|---------------|-------------------------|-------------------------|--|
| A        | <input checked="" type="checkbox"/> GENERAL LIABILITY  | X         |          | CPP2076876    | 06/06/2014              | 06/06/2015              | EACH OCCURRENCE \$ 1,000,000   |
|          | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY   |           |          |               |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000                                    |
|          | <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR                           |           |          |               |                         |                         | MED EXP (Any one person) \$ 5,000  |
|          |  |           |          |               |                         |                         | PERSONAL & ADV INJURY \$ 1,000,000   |
|          |  |           |          |               |                         |                         | GENERAL AGGREGATE \$ 2,000,000   |
|          |  |           |          |               |                         |                         | PRODUCTS - COMP/OP AGG \$ 2,000,000  |
|          | GEN'L AGGREGATE LIMIT APPLIES PER:   |           |          |               |                         |                         |  |
|          | <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC |           |          |               |                         |                         |  |
| B        | <input checked="" type="checkbox"/> AUTOMOBILE LIABILITY   |           |          | CA207687500   | 06/06/2014              | 06/06/2015              | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000                                       |
|          | <input checked="" type="checkbox"/> ANY AUTO ALL OWNED AUTOS   |           |          |               |                         |                         | BODILY INJURY (Per person) \$  |
|          | <input checked="" type="checkbox"/> HIRED AUTOS  |           |          |               |                         |                         | BODILY INJURY (Per accident) \$  |
|          | <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS   |           |          |               |                         |                         | PROPERTY DAMAGE (Per accident) \$  |
|          |  |           |          |               |                         |                         | \$   |
| A        | <input checked="" type="checkbox"/> UMBRELLA LIAB  |           |          | CU207687700   | 06/06/2014              | 06/06/2015              | EACH OCCURRENCE \$ 10,000,000  |
|          | <input checked="" type="checkbox"/> EXCESS LIAB  |           |          |               |                         |                         | AGGREGATE \$ 10,000,000  |
|          | <input type="checkbox"/> OCCUR   |           |          |               |                         |                         | \$   |
|          | <input type="checkbox"/> CLAIMS-MADE   |           |          |               |                         |                         | \$   |
|          | DED <input checked="" type="checkbox"/> RETENTION \$ 0   |           |          |               |                         |                         | \$   |
| B        | <input checked="" type="checkbox"/> WORKERS COMPENSATION AND EMPLOYERS' LIABILITY                        |           | N/A      | WC207687800   | 06/06/2014              | 06/06/2015              | <input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER |
|          | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)                              |           |          |               |                         |                         | E.L. EACH ACCIDENT \$ 1,000,000  |
|          | If yes, describe under DESCRIPTION OF OPERATIONS below   |           |          |               |                         |                         | E.L. DISEASE - EA EMPLOYEE \$ 1,000,000  |
|          |  |           |          |               |                         |                         | E.L. DISEASE - POLICY LIMIT \$ 1,000,000   |
| A        | Inland Marine  |           |          | CPP207687600  | 06/06/2014              | 06/06/2015              | Leased 25,000  |
| C        | Pollution  |           |          | CPL12770313   | 06/06/2014              | 06/06/2015              | Pollution 1,000,000  |

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)  
Project #P.001469 & 0511/Watkins ES AC DX Bldg. 1- Room 103F, 3520 SW 52 Ave, Pembroke Park, FL 33025. The School Board of Broward County, Owner, its members, officers, employees, agents are named Additional Insureds on a primary and non-contributory basis with respects to General Liability when required by written contract. Contractual Liability included.

### CERTIFICATE HOLDER

### CANCELLATION

SCHOOLO

The School Board of Broward County, Florida  
Supply Management & Logistics  
7720 W. Oakland Park Blvd #323  
Sunrise, FL 33351

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

**NOTEPAD**

INSURED'S NAME **Koldaire, Inc.**

**KOLDA-1**  
**OP ID: IP**

PAGE 2  
DATE **06/10/14**

BuildersRisk/Installation Floater policy provided by Amerisure Mutual:  
Effective 06/06/14 to 06/06/15; Policy #CPP20828880102; Limts-  
\$638,000 Any Single Location Limit  
\$638,000 Per Disaster Limit  
\$638,000 Temporary Location Limit  
\$638,000 Property in Transit Limit

Special Form; \$1,000 deductible applies per Occurrence



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/17/2014

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

**PRODUCER**  
**BROWN & BROWN OF FLORIDA INC**  
14900 NW 79th Court Suite#200  
Miami Lakes, FL 33016-5869  
Ryan Heimbold

Phone: 305-364-7800  
Fax: 305-714-4401

|   |  |                        |
|---|--|------------------------|
| <b>CONTACT NAME:</b>                      |  | <b>FAX (A/C, No.):</b> |
| <b>PHONE (A/C, No, Ext):</b>              |  |                        |
| <b>E-MAIL ADDRESS:</b>                    |  |                        |
| <b>INSURER(S) AFFORDING COVERAGE</b>      |  | <b>NAIC #</b>          |
| INSURER A: *Amerisure Mutual Insurance Co |  | 23396                  |
| INSURER B:                                |  |                        |
| INSURER C:                                |  |                        |
| INSURER D:                                |  |                        |
| INSURER E:                                |  |                        |
| INSURER F:                                |  |                        |

**INSURED**  
**School Board of Broward County**  
**Florida, Facilities and**  
**Construction Management**  
**Division**  
**C/O Koldaire, Inc.**  
**4659 NW 103 Ave**

**COVERAGES**                      **CERTIFICATE NUMBER:**                      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE   | ADDL SUBR INSR   WVD                     | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS                                       |                                |
|----------|---|--|---------------|-------------------------|-------------------------|--|--------------------------------|
| A        | <b>GENERAL LIABILITY</b>  |  | GL20782150302 | 12/31/2013              | 12/31/2014              | EACH OCCURRENCE                              | \$ 1,000,000                   |
|          | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY  |  |               |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence)    | \$                             |
|          | <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR                                       |  |               |                         |                         | MED EXP (Any one person)                     | \$                             |
|          | <input checked="" type="checkbox"/> Owner/Cont Prot.  |  |               |                         |                         | PERSONAL & ADV INJURY                        | \$                             |
|          | GEN'L AGGREGATE LIMIT APPLIES PER:  |  |               |                         |                         | GENERAL AGGREGATE                            | \$ 2,000,000                   |
|          | <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC |  |               |                         |                         | PRODUCTS - COMPI/OP AGG                      | \$                             |
|          |   |  |               |                         |                         |  | \$                             |
|          | <b>AUTOMOBILE LIABILITY</b>   |  |               |                         |                         | COMBINED SINGLE LIMIT (Ea accident)          | \$                             |
|          | <input type="checkbox"/> ANY AUTO   |  |               |                         |                         | BODILY INJURY (Per person)                   | \$                             |
|          | <input type="checkbox"/> ALL OWNED AUTOS  | <input type="checkbox"/> SCHEDULED AUTOS |               |                         |                         | BODILY INJURY (Per accident)                 | \$                             |
|          | <input type="checkbox"/> HIRED AUTOS  | <input type="checkbox"/> NON-OWNED AUTOS |               |                         |                         | PROPERTY DAMAGE (Per accident)               | \$                             |
|          |   |  |               |                         |                         |  | \$                             |
|          | <b>UMBRELLA LIAB</b>  | <input type="checkbox"/> OCCUR           |               |                         |                         | EACH OCCURRENCE                              | \$                             |
|          | <b>EXCESS LIAB</b>  | <input type="checkbox"/> CLAIMS-MADE     |               |                         |                         | AGGREGATE                                    | \$                             |
|          | <input type="checkbox"/> DED  | <input type="checkbox"/> RETENTION \$    |               |                         |                         |  | \$                             |
|          | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b>  |  |               |                         |                         | <input type="checkbox"/> WC STATUTORY LIMITS | <input type="checkbox"/> OTHER |
|          | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)                               | <input type="checkbox"/> Y/N             | N/A           |                         |                         | E.L. EACH ACCIDENT                           | \$                             |
|          | If yes, describe under DESCRIPTION OF OPERATIONS below  |  |               |                         |                         | E.L. DISEASE - EA EMPLOYEE                   | \$                             |
|          |   |  |               |                         |                         | E.L. DISEASE - POLICY LIMIT                  | \$                             |

**DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (Attach ACORD 101, Additional Remarks Schedule, if more space is required)**  
Project #P.001469 & 0511  
Watkins ES AC DX Bldg. 1- Room 103F  
3520 SW 52 Avenue  
Pembroke Park, FL 33025

|   |  |
|---|--|
| <b>CERTIFICATE HOLDER</b>   | <b>CANCELLATION</b>  |
| <b>SCHOOL</b>   | SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
| The School Board of Broward County, Florida<br>Supply Management & Logistics<br>7720 W. Oakland Park Blvd #323<br>Sunrise, FL 33351 | AUTHORIZED REPRESENTATIVE<br>  |



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/10/2014

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|  |  |  |                |
|--|--|--|----------------|
| <b>PRODUCER</b><br><b>BROWN &amp; BROWN OF FLORIDA INC</b><br>14900 NW 79th Court Suite#200<br>Miami Lakes, FL 33016-5869<br>Ryan Heimbold | Phone: 305-364-7800<br>Fax: 305-714-4401         | <b>CONTACT NAME:</b><br>PHONE (A/C, No, Ext):<br>E-MAIL ADDRESS: | FAX (A/C, No): |
|  | <b>INSURER(S) AFFORDING COVERAGE</b>             |  | <b>NAIC #</b>  |
| <b>INSURED</b><br><b>Koldaire, Inc.</b><br>4659 NW 103 Ave<br>Sunrise, FL 33351-7916   | <b>INSURER A: *Amerisure Mutual Insurance Co</b> |  | <b>23396</b>   |
|  | <b>INSURER B: *Amerisure Insurance Company*</b>  |  | <b>19488</b>   |
|  | <b>INSURER C: *Chartis Specialty Ins Co</b>      |  | <b>26883</b>   |
|  | <b>INSURER D:</b>                                |  |                |
|  | <b>INSURER E:</b>                                |  |                |
|  | <b>INSURER F:</b>                                |  |                |


**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE   | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS   |
|----------|---|-----------|----------|---------------|-------------------------|-------------------------|--|
| A        | <b>GENERAL LIABILITY</b><br><input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY<br><input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR<br><br>GEN'L AGGREGATE LIMIT APPLIES PER:<br><input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC | X         |          | CPP2076876    | 06/06/2014              | 06/06/2015              | EACH OCCURRENCE \$ 1,000,000   |
|          |   |           |          |               |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 50,000                                    |
| B        | <b>AUTOMOBILE LIABILITY</b><br><input checked="" type="checkbox"/> ANY AUTO ALL OWNED AUTOS<br><input checked="" type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS   |           |          | CA207687500   | 06/06/2014              | 06/06/2015              | BODILY INJURY (Per person) \$  |
|          |   |           |          |               |                         |                         | BODILY INJURY (Per accident) \$  |
|          |   |           |          |               |                         |                         | PROPERTY DAMAGE (Per accident) \$  |
|          |   |           |          |               |                         |                         | COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000                                       |
|          |   |           |          |               |                         |                         | AGGREGATE \$ 10,000,000  |
| A        | <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR<br><b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE<br>DED <input checked="" type="checkbox"/> RETENTION \$ 0   |           |          | CU207687700   | 06/06/2014              | 06/06/2015              | EACH OCCURRENCE \$ 10,000,000  |
|          |   |           |          |               |                         |                         | AGGREGATE \$ 10,000,000  |
| B        | <b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b><br>ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) <input type="checkbox"/> Y/N<br>If yes, describe under DESCRIPTION OF OPERATIONS below  | N/A       |          | WC207687800   | 06/06/2014              | 06/06/2015              | <input checked="" type="checkbox"/> WC STATUTORY LIMITS <input type="checkbox"/> OTHER |
|          |   |           |          |               |                         |                         | E.L. EACH ACCIDENT \$ 1,000,000  |
|          |   |           |          |               |                         |                         | E.L. DISEASE - EA EMPLOYEE \$ 1,000,000  |
| A        | <b>Inland Marine</b>  |           |          | CPP207687600  | 06/06/2014              | 06/06/2015              | Leased 25,000  |
| C        |   |           |          |               |                         |                         | <b>Pollution</b>   |

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

Project #P.000991 & 1661/ Hollywood Hills HS AC DX Bldg. 1 -1 Room 111D & EF Room 234, 5400 Stirling Road, Hollywood, FL 33021. The School Board of Broward County, Owner, its members, officers, employees, agents are named Additional Insureds on a primary and non-contributory basis with respects to General Liability when required by written contract. Contractual Liability included.

|   |   |
|---|---|
| <b>CERTIFICATE HOLDER</b><br><br><b>SCHOOL</b><br><br>The School Board of Broward County, Florida<br>Supply Management & Logistics<br>7720 W. Oakland Park Blvd #323<br>Sunrise, FL 33351 | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|   | AUTHORIZED REPRESENTATIVE<br>   |



**NOTEPAD**

INSURED'S NAME **Koldaire, Inc.**

**KOLDA-1**  
OP ID: IP

PAGE 2  
DATE **06/10/14**

BuildersRisk/Installation Floater policy provided by Amerisure Mutual:  
Effective 06/06/14 to 06/06/15; Policy #CPP20828880102; Limts-  
\$638,000 Any Single Location Limit  
\$638,000 Per Disaster Limit  
\$638,000 Temporary Location Limit  
\$638,000 Property in Transit Limit

Special Form; \$1,000 deductible applies per Occurrence



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)  
06/17/2014

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|  |  |   |       |               |
|--|--|---|-------|---------------|
| <b>PRODUCER</b><br><b>BROWN &amp; BROWN OF FLORIDA INC</b><br>14900 NW 79th Court Suite#200<br>Miami Lakes, FL 33016-5869<br>Ryan Heimbold                 | Phone: 305-364-7800<br>Fax: 305-714-4401 | <b>CONTACT NAME:</b><br>PHONE (A/C No, Ext):<br>E-MAIL ADDRESS: |       | FAX (A/C No): |
|  | <b>INSURER(S) AFFORDING COVERAGE</b>     |   |       | <b>NAIC #</b> |
| <b>INSURED</b><br>School Board of Broward County<br>Florida, Facilities and<br>Construction Management<br>Division<br>C/O Koldaie, Inc.<br>4659 NW 103 Ave |  | <b>INSURER A:</b> *Amerisure Mutual Insurance Co                | 23396 |               |
|  |  | <b>INSURER B:</b>   |       |               |
|  |  | <b>INSURER C:</b>   |       |               |
|  |  | <b>INSURER D:</b>   |       |               |
|  |  | <b>INSURER E:</b>   |       |               |
|  |  | <b>INSURER F:</b>   |       |               |


**COVERAGES**      **CERTIFICATE NUMBER:**      **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

| INSR LTR | TYPE OF INSURANCE   | ADDL INSR | SUBR WVD | POLICY NUMBER | POLICY EFF (MM/DD/YYYY) | POLICY EXP (MM/DD/YYYY) | LIMITS                                    |              |
|----------|---|-----------|----------|---------------|-------------------------|-------------------------|---|--------------|
| A        | GENERAL LIABILITY   |           |          | GL20782150302 | 12/31/2013              | 12/31/2014              | EACH OCCURRENCE                           | \$ 1,000,000 |
|          | <input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY            |           |          |               |                         |                         | DAMAGE TO RENTED PREMISES (Ea occurrence) | \$           |
|          | <input checked="" type="checkbox"/> Owner/Cont Prot.                        |           |          |               |                         |                         | MED EXP (Any one person)                  | \$           |
|          |   |           |          |               |                         |                         | PERSONAL & ADV INJURY                     | \$           |
|          |   |           |          |               |                         |                         | GENERAL AGGREGATE                         | \$ 2,000,000 |
|          |   |           |          |               |                         |                         | PRODUCTS - COM/OP AGG                     | \$           |
|          |   |           |          |               |                         |                         |   | \$           |
|          | AUTOMOBILE LIABILITY  |           |          |               |                         |                         | COMBINED SINGLE LIMIT (Ea accident)       | \$           |
|          | <input type="checkbox"/> ANY AUTO   |           |          |               |                         |                         | BODILY INJURY (Per person)                | \$           |
|          | <input type="checkbox"/> ALL OWNED AUTOS                                    |           |          |               |                         |                         | BODILY INJURY (Per accident)              | \$           |
|          | <input type="checkbox"/> HIRED AUTOS  |           |          |               |                         |                         | PROPERTY DAMAGE (Per accident)            | \$           |
|          |   |           |          |               |                         |                         |   | \$           |
|          | UMBRELLA LIAB   |           |          |               |                         |                         | EACH OCCURRENCE                           | \$           |
|          | <input type="checkbox"/> OCCUR  |           |          |               |                         |                         | AGGREGATE                                 | \$           |
|          | EXCESS LIAB   |           |          |               |                         |                         |   | \$           |
|          | <input type="checkbox"/> CLAIMS-MADE  |           |          |               |                         |                         |   | \$           |
|          | DED   |           |          |               |                         |                         | WC STATUTORY LIMITS                       |              |
|          | RETENTION \$  |           |          |               |                         |                         | OTHER                                     |              |
|          | WORKERS COMPENSATION AND EMPLOYERS' LIABILITY                               |           |          |               |                         |                         | E.L. EACH ACCIDENT                        | \$           |
|          | ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) |           |          |               |                         |                         | E.L. DISEASE - EA EMPLOYEE                | \$           |
|          | If yes, describe under DESCRIPTION OF OPERATIONS below                      |           |          |               |                         |                         | E.L. DISEASE - POLICY LIMIT               | \$           |

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

Project #P.000991 & 1661  
 Hollywood Hills HS AC DX Bldg. 1 -1 Room 111D & EF Room 234  
 5400 Stirling Road  
 Hollywood, FL 33021

|  |                |   |
|--|----------------|---|
| <b>CERTIFICATE HOLDER</b><br><br>The School Board of Broward County, Florida<br>Supply Management & Logistics<br>7720 W. Oakland Park Blvd #323<br>Sunrise, FL 33351 | <b>SCHOOLO</b> | <b>CANCELLATION</b><br><br>SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. |
|  |                | AUTHORIZED REPRESENTATIVE<br>   |

# EXHIBIT L-8



## THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

600 Southeast Third Avenue, Eleventh Floor · Fort Lauderdale, FLORIDA 33301 · TEL 754-321-1900 · FAX 754-321-2654

RISK MANAGEMENT DEPARTMENT  
ASTON A. HENRY, JR., DIRECTOR  
www.browardschools.com

**SCHOOL BOARD**  
PATRICIA GOOD, *Chair*  
DONNA P. KORN, *Vice Chair*

ROBIN BARTLEMAN  
HEATHER P. BRINKWORTH  
ABBY M. FREEDMAN  
LAURIE RICH LEVINSON  
ANN MURRAY  
DR. ROSALIND OSGOOD  
NORA RUPERT

**ROBERT W. RUNCIE**  
*Superintendent of Schools*

August 7, 2014

Advanced Roofing, Inc.  
1950 NW 22nd Street  
Ft. Lauderdale, FL 33311  
Attn: Danny Stokes

**SUBJECT: CERTIFICATE OF INSURANCE - APPROVAL**

Project: CSMP Open End Term 2014-35-FC

Project No: 2014-35-FC

Agreement: CSMP Construction Services Minor Projects 2014-35-FC

Dear Danny Stokes:

The Risk Management Department is pleased to inform you we are in receipt of your Certificate of Insurance, and the certificate meets the preliminary insurance specifications set forth in our agreement.

Once approval for commencement of construction on this project has been granted, your organization will be responsible for submitting proof of Builders Risk and/or Owners & Contractors Protective Liability coverage for approval by the Risk Management Department.

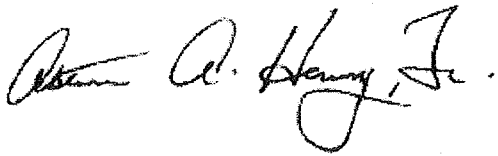
Please be advised, your organization is responsible for maintaining such coverage during the term of this agreement.

If you have access, you may send your future renewal certificates through CertificatesNow by referencing the routing number aayha-qnz8-gg. You may also send Certificate(s) of Insurance to the registered fax number 1-866-897-0425, or upload your Certificate(s) of Insurance directly at the below link:

<https://www.trackcertsnow.com/tcn/faxUpload/faxUpload.jsp>

If you have any questions or require additional information, please contact April Kowalski at 1-754-321-1916 or [april\\_kowalski@ajg.com](mailto:april_kowalski@ajg.com).

Sincerely,



Aston A. Henry, Jr., Director  
Risk Management Department

CC: Phil Kaufold, Design & Construction Contracts, FCM  
~~Kim Brown, Design & Construction Contracts, FCM~~

OCP is not required until an actual project is awarded. BR is not required until an actual project is awarded.

Tracking Number: 2739938

Blanket Certificate Summary

| Division | Group                         |
|----------|-------------------------------|
| FCM      | CSMP Open End Term 2014-35-FC |

# EXHIBIT L-9



## THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

600 Southeast Third Avenue, Eleventh Floor · Fort Lauderdale, FLORIDA 33301 · TEL 754-321-1900 · FAX 754-321-2654

RISK MANAGEMENT DEPARTMENT  
ASTON A. HENRY, JR., DIRECTOR  
www.browardschools.com

**SCHOOL BOARD**  
PATRICIA GOOD, *Chair*  
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ANN MURRAY  
DR. ROSALIND OSGOOD  
NORA RUPERT

**ROBERT W. RUNCIE**  
*Superintendent of Schools*

August 7, 2014

Advanced Roofing, Inc.  
1950 NW 22nd Street  
Ft. Lauderdale, FL 33311  
Attn: Danny Stokes

**SUBJECT: CERTIFICATE OF INSURANCE - APPROVAL**

Project: Riverglades ES P.001442 (fka 2014-35-FC) 1yr warranty  
Project No: P.001442  
Agreement: CSMP Construction Services Minor Projects 2014-35-FC

Dear Danny Stokes:

The Risk Management Department is pleased to inform you we are in receipt of your Certificate of Insurance, and the certificate meets the preliminary insurance specifications set forth in our agreement.

Once approval for commencement of construction on this project has been granted, your organization will be responsible for submitting proof of Builders Risk and/or Owners & Contractors Protective Liability coverage for approval by the Risk Management Department.

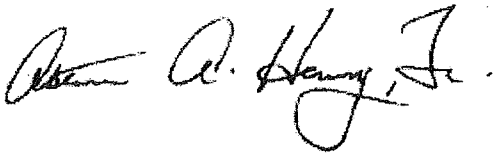
Please be advised, your organization is responsible for maintaining such coverage during the term of this agreement.

If you have access, you may send your future renewal certificates through CertificatesNow by referencing the routing number ab569-qnz8-5f. You may also send Certificate(s) of Insurance to the registered fax number 1-866-897-0425, or upload your Certificate(s) of Insurance directly at the below link:

<https://www.trackcertsnow.com/tcn/faxUpload/faxUpload.jsp>

If you have any questions or require additional information, please contact April Kowalski at 1-754-321-1916 or [april\\_kowalski@ajg.com](mailto:april_kowalski@ajg.com).

Sincerely,



Aston A. Henry, Jr., Director  
Risk Management Department

CC: Robert Stagliano, Design & Construction Contracts, FCM  
Design & Construction Contracts, FCM

OCP is not required until an actual project is awarded. BR is not required until an actual project is awarded.

Tracking Number: 2739985

Blanket Certificate Summary

**Division**

FCM

**Group**

Riverglades ES P.001442 (fka 2014-35-FC) 1yr warranty





|   |
|---|
| Revised 12/20/13 for URS Review<br>Please Initial Above |
|---|

**AGREEMENT FOR OPEN END SERVICES FOR  
PROGRAM MANAGEMENT SERVICES**

**BETWEEN  
THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA  
AND PROGRAM MANAGER**

THIS AGREEMENT, made this 22nd day of January in the year Two Thousand Fourteen, by and between **THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA** (hereinafter called the "Owner" "SBBC" and/or "Board"), and:

**URS CORPORATION SOUTHERN**

In accordance with Sections 255.103, 1013.45 Florida Statutes, and State Requirements for Educational Facilities 4.1 (SREF), which make provision for a contract with a firm to provide professional program management services to a school board, Owner has selected Program Manager, and Program Manager has agreed to provide the Work as set forth herein for the Project and such phases as may be required and directed from time to time at the sole discretion of Owner. It is agreed that this Agreement is an "Open End" Agreement in that the Owner will from time to time during the term of this Agreement require Work from the Program Manager on various projects. Rather than enter into separate agreements each time Work is required, the Owner and Program Manager shall enter into this Agreement. The terms and conditions of this Agreement shall govern each of the individual projects for which the Program Manager is hired to provide Work, per Attachment "1" to this Agreement, Scope of Work for Program Management Services. For each project, or group of projects, hereinafter referred to the "Project", some or all of this Work will be part of the Scope of Work for that particular project or any additional Work required by the Owner, related to the intended Scope of this Agreement. The Owner's Representative

# EXHIBIT M

REVISED  
12/11/13

URS Review and  
Approves  
*[Signature]*  
Initial Above *[Signature]*

## 5.2. Supplemental Fee:

5.2.1. The Program Manager may be authorized to perform Supplemental Services. See Article 5.1.4. The fee for such services will be based upon a Cost Plus with a Guaranteed Maximum Price based on Direct Personnel Expenses. Owner, at Owner's sole discretion, may negotiate and agree with Program Manager on the hourly salary rates for such employee categories or levels as may be appropriate to accomplish the Supplemental Services. Where a mutually agreeable Cost Plus with a Guaranteed Maximum based on Direct Personnel Expense cannot be arrived at, the Owner may secure services from an independent source or from the Owner's resources. The Program Manager shall provide any information and/or copies of project documentation necessary to facilitate the provision of said supplemental services by others.

## 5.3. Direct Salary Expense:



5.3.1. Where this Agreement or Attachments 1, 4, and 5 hereto indicates a fee computed on the basis of Direct Salary Expense, such fee shall be a not-to-exceed amount based on the following hourly rates:

### 5.3.2.


| Labor Classification                      | Base Rate | Burden Factors |        |           |            | OH/P   | Total    |
|---|-----------|----------------|--------|-----------|------------|--------|----------|
|   |           | Taxes          | W/C    | Insurance | Retirement | %      |          |
| Executive Program Manager                 | \$74.52   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$134.78 |
| Program Controls/<br>Clerk Specialist IV  | \$44.92   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$81.24  |
| Senior Project Manager                    | \$65.08   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$117.70 |
| Project Manager                           | \$61.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$110.32 |
| Document Control/<br>Clerk Specialist III | \$31.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$56.07  |
| Design Manager<br>(Sub-Consultant)        | \$52.89   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$95.66  |
| Estimator (Sub-Consultant)                | \$38.47   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$69.58  |
| Scheduler (Sub-Consultant)                | \$38.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$68.73  |
| Project Manager                           | \$43.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$77.77  |
| Project Manager<br>(Sub-Consultant)       | \$50.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$90.43  |




Note: The hourly rates will be negotiated fixed hourly rates. The Program Manager will submit to the Owner the labor rate per hour and the actual fringe benefit rate per hour for each labor classification. The Program Manager will provide the cost per hour for each component of the fringe benefit rate. The Owner will review the labor and fringe benefit rate and based on the review will negotiate the labor rate set forth above, and, Overhead and Profit. The labor rate will be used in pricing Work subject to this Agreement.


---

From:  **Patrick O. Reilly** Monday, December 09, 2013 5:48:50 PM 

Subject: URS

To:  **Shelley N. Meloni**

Cc:  **Gerardo Usallan**  **Robert Goode**  **Joe Wright**

Attachments:  DOC120913.pdf / Uploaded File (146K)

---

Attached is page 15 of 38 of the PM Services Agreement and an Excel spreadsheet of the Direct Salary Expenses. There is a little difference from our calculation. See you on Wednesday at 4:30pm.

Patrick Reilly, Chief Auditor  
Office of the Chief Auditor  
Office (754) 321-2400  
Fax (754) 321-2719  
[patreilly@browardschools.com](mailto:patreilly@browardschools.com)

Under Florida law, email addresses are public records. Your email address and the contents of any email sent to the sender of this communication will be released in response to any request for public records, except as excluded by F.S. 119.071, 1002.22(3) (d) [student records], or any other law of the State of Florida. If you do not want your email address to be released as part of any public records request, do not send email to this address, rather contact this office by phone or in writing.

**5.2. Supplemental Fee:**

5.2.1. The Program Manager may be authorized to perform Supplemental Services. See Article 5.1.4. The fee for such services will be based upon a Cost Plus with a Guaranteed Maximum Price based on Direct Personnel Expenses. Owner, at Owner's sole discretion, may negotiate and agree with Program Manager on the hourly salary rates for such employee categories or levels as may be appropriate to accomplish the Supplemental Services. Where a mutually agreeable Cost Plus with a Guaranteed Maximum based on Direct Personnel Expense cannot be arrived at, the Owner may secure services from an independent source or from the Owner's resources. The Program Manager shall provide any information and/or copies of project documentation necessary to facilitate the provision of said supplemental services by others.

Incorrect labor Rates submitted with original proposal

**5.3. Direct Salary Expense:**

5.3.1. Where this Agreement or Attachments 1, 4, and 5 hereto indicates a fee computed on the basis of Direct Salary Expense, such fee shall be a not-to-exceed amount based on the following hourly rates:

| Labor Classification                   | Base Rate | Burden Factors |        |           |            | OH/P   | Total    |
|--|-----------|----------------|--------|-----------|------------|--------|----------|
|  |           | Taxes          | W/C    | Insurance | Retirement | %      |          |
| Executive Program Manager              | \$74.52   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$135.61 |
| Program Controls/ Clerk Specialist IV  | \$44.92   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$81.75  |
| Senior Project Manager                 | \$65.08   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$118.45 |
| Project Manager                        | \$61.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$111.02 |
| Document Control/ Clerk Specialist III | \$31.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$56.42  |
| Design Manager (Sub-Consultant)        | \$52.89   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$96.26  |
| Estimator (Sub-Consultant)             | \$38.47   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$70.02  |
| Scheduler (Sub-Consultant)             | \$38.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$69.16  |
| Project Manager                        | \$43.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$78.26  |
| Project Manager (Sub-Consultant)       | \$50.00   | 11.165%        | 0.229% | 10.401%   | 2.422%     | 45.60% | \$91.00  |


Note: The hourly rates will be negotiated fixed hourly rates. The Program Manager will submit to the Owner the labor rate per hour and the actual fringe benefit rate per hour for each labor classification. The Program Manager will provide the cost per hour for each component of the fringe benefit rate. The Owner will review the labor and fringe benefit rate and based on the review will negotiate the labor rate set forth above, and, Overhead and Profit. The labor rate will be used in pricing Work subject to this Agreement.

| Labor Classification                   | Base Rate | Taxes   | Burden Factors |           |            |        | Total    | OCA      | Δ      |
|--|-----------|---------|----------------|-----------|------------|--------|----------|----------|--------|
|  |           |         | W/C            | Insurance | Retirement | OH/P   |          |          |        |
| Executive Program Manager              | \$74.52   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$135.61 | \$134.78 | \$0.83 |
| Program Controls/ Clerk Specialist IV  | \$44.92   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$81.75  | \$81.24  | \$0.51 |
| Senior Project Manager                 | \$65.08   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$118.45 | \$117.70 | \$0.75 |
| Project Manager                        | \$81.00   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$111.02 | \$110.32 | \$0.70 |
| Document Control/ Clerk Specialist III | \$31.00   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$56.42  | \$56.07  | \$0.35 |
| Design Manager (Sub-Consultant)        | \$52.89   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$96.26  | \$95.66  | \$0.60 |
| Estimator (Sub-Consultant)             | \$38.47   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$70.02  | \$69.58  | \$0.44 |
| Scheduler (Sub-Consultant)             | \$38.00   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$69.16  | \$68.73  | \$0.43 |
| Project Manager                        | \$43.00   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$78.26  | \$77.77  | \$0.49 |
| Project Manager (Sub-Consultant)       | \$50.00   | 11.165% | 0.229%         | 10.401%   | 2.422%     | 45.60% | \$91.00  | \$90.43  | \$0.57 |

Office of the Chief Auditor's corrected Program Manager labor rates.

Printed by: Gerardo Usallan  
Wednesday, December 03, 2014 8:45:28 AM

From: Shelley N. Meloni

Monday, December 09, 2013 11:14:21 PM 

Subject: Re: URS

To: Patrick O. Reilly

Cc: Gerardo Usallan Robert Goode Joe Wright

Thanks, Pat.

Sent from FirstClass with my iPhone

**Patrick O. Reilly writes:**

Attached is page 15 of 38 of the PM Services Agreement and an Excel spreadsheet of the Direct Salary Expenses. There is a little difference from our calculation. See you on Wednesday at 4:30pm.

Patrick Reilly, Chief Auditor  
Office of the Chief Auditor  
Office (754) 321-2400  
Fax (754) 321-2719  
[patreilly@browardschools.com](mailto:patreilly@browardschools.com)

Under Florida law, email addresses are public records. Your email address and the contents of any email sent to the sender of this communication will be released in response to any request for public records, except as excluded by F.S. 119.071, 1002.22(3) (d) [student records], or any other law of the State of Florida. If you do not want your email address to be released as part of any public records request, do not send email to this address, rather contact this office by phone or in writing.

*The School Board of Broward County, Florida*

*Office of the Chief Auditor*

*Patrick Reilly, Chief Auditor*

December 13, 2013

TO: Ms. Shelley Meloni,  
Chief Facilities and Construction Officer, Task Assigned  
Office of Facilities and Construction

FROM: Mr. Patrick Reilly, Chief Auditor *PR*  
Office of the Chief Auditor

**SUBJECTS: December 17, 2013 RSBM Agenda Items JJ-4, JJ-5, JJ-6 and J-1  
Boyd Anderson HS - Project No. P.000326 / 1741-25-01 - Financial Close Out**

Pursuant to our meeting on Thursday, December 12, 2013, with you and my Facility Audits staff, I am providing you our comments and recommendations we discussed regarding the subject agenda items and the Boyd Anderson High School project.

**JJ-4. Change Order No.1 \$3,062,254 – Cooper City High School  
Concurrent Phased Replacement – Project No. P.001539 (1931)  
Skanska USA Building, Inc.**

We recommend you pull this item off the December 17, 2013 agenda, so it may be reviewed and processed according to the current policy and procedures in place, as well as the design build contract change order provisions. The requirements of Design and Construction Bulletin No. 54 Change Order Process were not met (see Exhibit 1) which states; ***“Note: All change orders over \$100,000.00 will be reviewed by a third party independent cost estimator prior to submission to the internal Change Order Review Committee [Project Management Council (PMC)].”***. Further, we find that this change order was not vetted through the PM Council or the Office of Facilities and Construction Agenda Preparation Group (APG) review meeting as required by the flow chart (see Exhibit 1).

This change order requires additional study and review of the backup information and breakdowns of the subcontract costs, compensable daily rate for general conditions, the overhead-profit-bond mark-up percentages that were just made available to us on December 12, 2013. Some of the costs included in this change order lack entitlement under the contract provisions. We have additional concerns on the contractor’s qualifications and exclusions.

Finally, any request for additional contract time requires a Time Impact Analysis per SBBC Specification 01250 Contract Modification Procedures; paragraph 1.5 Documentation of Change



in Contract Sum/Time and Contract Time, E. 2. Time Impact Analysis (see Exhibit 2) which has not been provided.

**JJ-5. Approve Authorization to Proceed – Program Management Services  
RFQ No. 2014-31-FC (Open Agenda)**

**URS CORPORATION SOUTHERN**

**Agreement For Open End Services For Program Management Services**

- 1. Pre-Programing - ATP**
- 2. Project Planning, Selection & Design Phase - ATP**
- 3. Preconstruction and Construction Phase - ATP**
- 4. Facility Opening and Project Closeout Phase - ATP**

The Office of the Chief Auditor (OCA) recommends the Office of Facilities and Construction (OFC) restructure the proposed ATP and not issue a lump sum \$437,500 ATP to perform those Program Management Services that are identified in the subject ATP's scope of work items. It is OCA's opinion that issuing a single lump sum amount for the four activities would prevent effective management of the contract and would not allow for a way to determine project expenditures and measure the effectiveness of the Program Manager's services and deliverables. Although you felt URS would not be able to provide this breakdown and separation of the four activity costs, you agreed to require URS to provide separate ATP costs for the four activities prior to executing the ATP as described in the paragraph below.

In order to effectively manage this work, the \$437,500 lump sum fee should be broken down into separate costs for the four activities described on page 3 of 3 of the ATP dated December 17, 2013. Additional breakdowns of the services described in the four activities enumerated in the contract's Attachment 1: Scope of Work, similar to a schedule of values, would provide management the necessary tools to identify services provided and correctly track and evaluate the related request for payment of the hourly rates used to provide the services.

In addition, we recommend that upon the Program Manager's engaging services for any of the (49) projects listed in the contract's List of Projects, OFC follow the OCA recommendation to issue separate project specific ATP's similar to the format listed in the above paragraph.

As discussed, we recommend that the language in the Executive Summary paragraph 1, sentence 3, which states "*This also authorizes the Office of Facilities & Construction to issue one or more ATPs . . .*" be added to the ATP.

We noticed some typographical errors on the Executive Summary where the use of Exhibit 3 identifying the ATP should be changed to Exhibit 2, as discussed yesterday. Also the uses of Exhibits 2 & 3 do not delineate the fees for services.

# EXHIBIT O-3

## **JJ-6. Authorization to Proceed – Construction and Operational Auditing Services - RFP 11-013V**

Our office was never contacted to assist with the procurement of auditing services. This RFP 11-013V Construction and Operational Auditing Services contains a pool of qualified firms. This RFP, Section 2.1, paragraph 2 (see Exhibit 3) states “*Prior to initiation of each audit assignment, the awardee(s) shall submit a Letter of Engagement to the Office of the Chief Auditor for review, approval and assignment. The Letter of Engagement shall include, but not be limited to, audit objectives, statement of deliverables, scope, approach, estimated time required to complete an assignment and total cost for the assignment. The Letter of Engagement, outline the agreed upon procedures and scope of work, must be signed by the Chief Auditor and awardee, prior to commencing any auditing services. Services, when requested, must be responded to within 14 business days.*” An opportunity to get additional offers in order to obtain a competitive cost proposal from other cadre vendors, such as KPMG, LLP, was not exercised. The Letter of Engagement was not submitted to the Office of the Chief Auditor.

In 2012, McGladrey, LLP was issued a \$99,950 purchase order after obtaining competitive cost proposals from other cadre firms. I recommend that compliance with contract requirements be adhered to by allowing our office to assist with the procurement of audit services.

The agenda item JJ-6 states “*the OF&C desires to engage McGladrey, LLP to perform quality assurance monitoring and review of the Program Manager, as well as provide quarterly reports on the Program Manager’s performance.*” However, there is no reference to Task 2 – Construction Contract Compliance Reviews for specified projects, as requested. The Agenda and the Executive Summary should include a statement that the services of the vendor also include other construction auditing services.

For information purposes, the use of RFP 11-013V did not require an agenda item. This RFP was already approved with a \$350,000 per year authorization and was available for use simply by issuing a purchase order. The desire to use an outside firm to monitor the Program Manager, as detailed in the Executive Summary of JJ-5, would have sufficed.

This Agenda item has multiple question marks (typographical errors) that should be removed on the final version.

## **J-1. Award of Contract – Program Management Services – RFQ No. 2014-31-FC**

We noted in the Executive Summary, our memo dated October 18, 2013, is included; however, the attachments are not included.

Since the award of the contract for Program Management exceeds \$1 million, we question why it is not a JJ item, rather than a J item.

Per our discussion, you stated that the contract with URS is for the amount of \$1,750,369 for the scope of work in the first year; however, the contract clearly shows this contract could be used

## EXHIBIT O-4

for up to \$2 million per year for any additional scope of work. You stated that the remaining \$249,631 cannot be expended under this contract and the \$249,631 can be used for another vendor. Our understanding at the Negotiations meeting was that the \$249,631 was going to be used as contingency under this contract for possible additional work. Please clarify this issue.

We also noted that on J-1, the contract article 5.3.1 table of hourly rates contains math errors that require correcting (see Exhibit 4) ←

See Exhibit O-5 for schedule

**Boyd Anderson High School**  
**Project No. P.000326 / 1741-25-01**  
**Request for a Financial Close-Out Audit**

Due to this construction manager's refusal to cooperate with the terms of the Right to Audit clause of their contract, the General Counsel's Office should intervene and send a demand letter to the construction manager to assure access to the records and documents before an auditing firm is engaged to perform the financial close-out audit.

OCA's staff has performed numerous financial close-out audits for CM @ Risk projects. In an effort to broaden our perspective with such audits, we recommend that we engage one of our cadre of outside independent auditing firms to perform this audit on the Boyd Anderson High School project.

Please contact our office at 754-321-2400 if you have any questions.

cc: Robert L. Goode, Manager of Facility Audits  
Gerry Usallan, Manager of Facility Audits  
Joe Wright, Auditor III  
Jeffrey Moquin, Chief of Staff

| Labor Classification                   | Base Rate | Burden Factors 24.217% Total |               |                      |                      | Sub-Total | OH&P<br>45.60% | OCA       | URS       | Delta (Δ) |
|--|-----------|------------------------------|---------------|----------------------|----------------------|-----------|----------------|-----------|-----------|-----------|
|  |           | Taxes<br>11.165%             | W/C<br>0.229% | Insurance<br>10.401% | Retirement<br>2.422% |           |                |           |           |           |
|  |           |                              |               |                      |                      |           |                |           |           |           |
| Executive Program Manager              | \$ 74.52  | \$ 8.32                      | \$ 0.17       | \$ 7.75              | \$ 1.80              | \$ 92.57  | \$ 42.21       | \$ 134.78 | \$ 135.61 | \$ (0.83) |
| Program Controls/ Clerk Specialist IV  | \$ 44.92  | \$ 5.02                      | \$ 0.10       | \$ 4.67              | \$ 1.09              | \$ 55.80  | \$ 25.44       | \$ 81.24  | \$ 81.75  | \$ (0.51) |
| Senior Project Manager                 | \$ 65.08  | \$ 7.27                      | \$ 0.15       | \$ 6.77              | \$ 1.58              | \$ 80.84  | \$ 36.86       | \$ 117.70 | \$ 118.45 | \$ (0.75) |
| Project Manager                        | \$ 61.00  | \$ 6.81                      | \$ 0.14       | \$ 6.34              | \$ 1.48              | \$ 75.77  | \$ 34.55       | \$ 110.32 | \$ 111.02 | \$ (0.70) |
| Document Control/ Clerk Specialist III | \$ 31.00  | \$ 3.46                      | \$ 0.07       | \$ 3.22              | \$ 0.75              | \$ 38.51  | \$ 17.56       | \$ 56.07  | \$ 56.42  | \$ (0.35) |
| Design Manager (Sub-Consultant)        | \$ 52.89  | \$ 5.91                      | \$ 0.12       | \$ 5.50              | \$ 1.28              | \$ 65.70  | \$ 29.96       | \$ 95.66  | \$ 96.26  | \$ (0.60) |
| Estimator (Sub-Consultant)             | \$ 38.47  | \$ 4.30                      | \$ 0.09       | \$ 4.00              | \$ 0.93              | \$ 47.79  | \$ 21.79       | \$ 69.58  | \$ 70.02  | \$ (0.44) |
| Scheduler (Sub-Consultant)             | \$ 38.00  | \$ 4.24                      | \$ 0.09       | \$ 3.95              | \$ 0.92              | \$ 47.20  | \$ 21.52       | \$ 68.73  | \$ 69.16  | \$ (0.43) |
| Project Manager                        | \$ 43.00  | \$ 4.80                      | \$ 0.10       | \$ 4.47              | \$ 1.04              | \$ 53.41  | \$ 24.36       | \$ 77.77  | \$ 78.26  | \$ (0.49) |
| Project Manager (Sub-Consultant)       | \$ 50.00  | \$ 5.58                      | \$ 0.11       | \$ 5.20              | \$ 1.21              | \$ 62.11  | \$ 28.32       | \$ 90.43  | \$ 91.00  | \$ (0.57) |

Office of the Chief Auditor's corrected Program Manager labor rates

5401271538



2014 JUL 10  
 The School Board of Broward County, Florida  
 Office of Facilities & Construction  
 3775 S.W. 16<sup>th</sup> Street, Fort Lauderdale, FL 33312  
 (754) 321-1500

URS 9603-P.001599

Program Manager's Invoice

Program Manager: Stephen Baumas  
 Remit to address: URS Corporation  
 Southern  
 P.O. Box 116183  
 Atlanta GA 30368-6183

Date: 6/27/2014 ✓  
 Invoice No: 5929083 ✓  
 SBBC PO No. 7514007974 ✓  
 ATP No. 01 L#1  
 Invoice From: 2/13/2014 -  
 5/29/2014

2014 JUL -7 PM 2:48  
 FACILITIES AND  
 CONSTRUCTION

MENTS  
 12:02

| Other Services   | \$ 437,592.00 |
|------------------|---------------|
| General Services | \$ 437,592.00 |
| Burden Factors   |               |
| W/C              | Insurance     |
| 0.229%           | 10.401%       |
| Retirement       | OE/ID-off%    |
| 2.422%           | 45.60%        |

INVOICE TOTALS:

\$ 246,972.93

| Summary             | Current Fee          | Previously Billed | This Invoice            | Balance                            |
|---------------------|----------------------|-------------------|-------------------------|------------------------------------|
| Program Mgmt. Svcs. | \$ 429,492.00        | \$ 0.00           | <del>\$246,836.82</del> | <del>\$182,655.18</del> 182,599.07 |
| Reimbursable        | \$ 8,100.00          | \$ 0.00           | <del>\$18.48</del> (A)  | <del>\$8,081.52</del> 8,100.00     |
| <b>Total:</b>       | <b>\$ 437,592.00</b> | <b>\$ 0.00</b>    | <b>\$246,855.30</b>     | <b>\$190,736.70</b> 190,699.07     |

BASIC FEE TOTALS

| Project Name                     | Hours Worked | Previously Billed | This Invoice                     | Balance                        |
|----------------------------------|--------------|-------------------|----------------------------------|--------------------------------|
| DISTRICT WIDE PROGRAM MANAGEMENT | 2505         | \$ 0.00           | \$246,855.30 - 56%<br>246,972.93 | \$190,736.70 44%<br>190,699.07 |
| <b>Total Previously Billed:</b>  |              | <b>\$ 0.00</b>    | <b>\$246,855.30</b>              | <b>\$190,736.70</b>            |

|   |   |   |  |
|---|---|---|--|
| <b>Submitted By:</b><br>Name: Stephen Baumas<br>Title: Executive Program Manager<br>Date: 7/3/2014<br>(Signature) | <b>Certified By:</b><br>Name: _____<br>Title: Project Manager III<br>Date: N/A<br>(Signature) | <b>Recommended By:</b><br>Name: _____<br>Title: _____<br>Date: N/A<br>(Signature) | <b>Approved By:</b><br>Shelley N. Meloni<br>Executive Director<br>Date: 8/26/14<br>(Signature) |
|---|---|---|--|

The School Board of Broward County, Florida  
 Professional Services Agreement - Attachment 2  
 July 23, 2013

(A) - Resubmit when authorized by ATP  
 Program Manager's Invoice Format  
 Page of 3  
 CAPITAL PAYMENT  
 2014 JUL -9 AM 7:53

Reviewal Phase

Reviewal 8/27/14

Pam Took to Capital 8-26-14

*Review Notes (A)*

**LOADED RATES PER CONTRACT**

|                                       | Base Rate | Burden % Total | OH/P % | BILLABLE RATE | MAX Total |
|---------------------------------------|-----------|----------------|--------|---------------|-----------|
| Executive Program Manager             | \$74.52   | 24.9894%       | 45.60% | \$135.61      | \$135.61  |
| Program Controls/ Clerk Specialist IV | \$44.92   | 25.0000%       | 45.60% | \$81.75       | \$81.75   |
| Senior Project Manager                | \$65.08   | 25.0000%       | 45.60% | \$118.45      | \$118.45  |
| Project Manager                       | \$61.00   | 25.0000%       | 45.60% | \$111.02      | \$111.02  |
| Document Control/Clerk Specialist III | \$31.00   | 25.0000%       | 45.60% | \$56.42       | \$56.42   |
| Scheduler                             | \$38.00   | 25.0000%       | 45.60% | \$69.16       | \$69.16   |
| Design Manager (Sub-Consultant)       | \$52.89   | 25.0000%       | 45.60% | \$96.26       | \$96.26   |
| Design Manager (Sub-Consultant)       | \$52.89   | 25.0000%       | 45.60% | \$96.26       | \$96.26   |
| Project Manager (Sub-Consultant)      | \$45.64   | 25.0000%       | 45.60% | \$83.06       | \$83.06   |
| Project Manager (Sub-Consultant)      | \$40.87   | 25.0000%       | 45.60% | \$74.38       | \$74.38   |

**BILLED FOR 02/28/14-05/29/14**

|                                       | Hours | BILLABLE RATE | Calculated Bill   | Actual Bill | CHANGE |
|---------------------------------------|-------|---------------|-------------------|-------------|--------|
| Executive Program Manager             | 453   | 135.61        | 61,431.33         | 61,438.76   | (7.43) |
| Program Controls/ Clerk Specialist IV | 512   | 81.75         | 41,856.00         | 41,858.25   | (2.25) |
| Senior Project Manager                | 408   | 118.45        | 48,327.60         | 48,325.80   | 1.80   |
| Project Manager                       | 256   | 111.02        | 28,421.12         | 28,421.12   | -      |
| Document Control/Clerk Specialist III | 252   | 56.42         | 14,217.84         | 14,217.84   | -      |
| Scheduler                             | 64    | 69.16         | 4,426.24          | 4,426.24    | -      |
|                                       | 1,945 |               | 198,680.13        |             |        |
| Design Manager (Sub-Consultant)       | 200   | 96.26         | 19,252.00         | 19,132.00   | 120.00 |
| Design Manager (Sub-Consultant)       | 40    | 96.26         | 3,850.40          | 3,826.40    | 24.00  |
| Project Manager (Sub-Consultant)      | 160   | 83.06         | 13,289.60         | 13,289.60   | -      |
| Project Manager (Sub-Consultant)      | 160   | 74.38         | 11,900.80         | 11,900.80   | -      |
|                                       | 560   |               | 48,292.80         |             |        |
|                                       |       |               | <u>246,972.93</u> |             |        |

Authorized

Remaining

429,492.00

182,519.07

FILE COPY

CAPITAL PAYMENTS

FACILITIES AND CONSTRUCTION



PH 2-25

The School Board of Broward County, Florida  
Office of Facilities & Construction  
3775 S.W. 16<sup>th</sup> Street, Fort Lauderdale, FL 33312

(754) 321-1500

Program Manager's Invoice

URS 9603-P.001599

Date: 9/26/2014 ✓  
Invoice No: 6017151 ✓  
SBBC PO No. 7514007974 ✓  
ATP No. 01  
Invoice From: 5/12/2014 - 6/30/2014

Revised  
C.#1

Program Manager: Stephen Baumaal  
Remit to address: URS Corporation  
Southern  
P.O. Box 116183  
Atlanta GA 30368-6183

|                    |               |                |             |
|--------------------|---------------|----------------|-------------|
| Original Basic Fee | \$ 437,592.00 |                |             |
| Current Basic Fee  | \$ 437,592.00 |                |             |
|                    |               | Burden Factors | OR/Profit % |
|                    |               |                | %           |
|                    |               | 25.00%         | 35.60%      |

INVOICE TOTALS:

| Summary             | Current Fee   | Previously Billed | This Invoice | Balance     |
|---------------------|---------------|-------------------|--------------|-------------|
| Program Mgmt. Svcs. | \$ 429,492.00 | \$ 246,810.45     | \$165,733.84 | \$16,802.71 |
| Reimbursable        | \$ 8,100.00   | \$ 18.48          | \$624.82     | \$7,456.70  |
| <b>Total:</b>       | \$ 437,592.00 | \$246,828.93      | \$166,358.66 | \$24,404.41 |

BASIC FEE TOTALS

| Project Name                      | Hours Worked | Previously Billed                | This Invoice     | Balance                       |
|-----------------------------------|--------------|----------------------------------|------------------|-------------------------------|
| DISTRICT WIDE PROGRAM MANAGEMENT  | 1864         | \$246,828.93 56%<br>\$246,972.93 | \$166,358.66 38% | \$24,404.41 6%<br>\$24,260.41 |
| <b>Total Previously Billed:</b>   |              | \$ 246,828.93                    | \$166,358.66     | \$24,404.41                   |
| <b>Total Amount This Invoice:</b> |              |                                  | \$165,733.84     | \$24,260.41                   |
| <b>Total Balance:</b>             |              |                                  |                  | \$24,885.23                   |

|  |   |   |  |
|--|---|---|--|
| <b>Submitted By:</b><br>Name: Stephen Baumaal<br>Title: Executive Program Manager<br>Date: 10/06/2014<br>(Signature) | <b>Certified By:</b><br>Name: _____<br>Title: Project Manager<br>Date: _____<br>(Signature) | <b>Recommended By:</b><br>Name: _____<br>Title: _____<br>Date: _____<br>(Signature) | <b>Approved By:</b><br>Name: Shelley N. Meloni<br>Title: Executive Director<br>Date: 10/13/14<br>(Signature) |
|--|---|---|--|

The School Board of Broward County, Florida  
Professional Services Agreement - Attachment 2  
July 23, 2013

Program Manager's Invoice Format  
Page 2 of 3

Omit reimbursables pending revised ATP  
VOM

Need an ATP (revised) for Reimbursables. 10/2/14

# EXHIBIT Q

Project Name: Broward Co. Schools PM Svcs.  
 Project No.: 12806673  
 Invoice No.: 6017151  
 Invoice Period: 5/12/2014 thru 6/30/2014

## URS

### Invoice Summary

| Description                    | Contract Amount     | Total Billed        | Remaining          | Current Billed      |
|--------------------------------|---------------------|---------------------|--------------------|---------------------|
| Line 1 - Labor                 | \$429,492.00        | \$412,544.29        | \$16,947.71        | \$165,733.84        |
| Line 2 - Reimbursable Expenses | \$8,100.00          | \$843.30            | \$7,456.70         | \$624.82            |
| <b>Total</b>                   | <b>\$437,592.00</b> | <b>\$413,187.59</b> | <b>\$24,404.41</b> | <b>\$166,358.66</b> |

### Professional Fees

#### URS Labor

| Labor Classification                  | Company | Name of Person Assigned | Burdened Rate Including OH/Profit | Labor Hrs. This Invoice | Total Amount This Invoice |
|---------------------------------------|---------|-------------------------|-----------------------------------|-------------------------|---------------------------|
| Executive Program Manager             | URS     | Stephen Baumal          | \$135.61                          | 150                     | \$20,341.50               |
| Program Controls/Clerk Specialist IV  | URS     | Natalie DuQuesnay       | \$81.75                           | 174                     | \$14,224.50               |
| Senior Project Manager                | URS     | Daniel Munich           | \$118.45                          | 176                     | \$20,847.20               |
| Project Manager I                     | URS     | Robert Stagliano        | \$111.02                          | 160                     | \$17,763.20               |
| Document Control/Clerk Specialist III | URS     | Präomene Tomasino       | \$56.42                           | 128                     | \$7,221.76                |
| Scheduler                             | URS     | Efrain Alfonso          | \$69.16                           | 120                     | \$8,299.20                |
| Document Control/Clerk Specialist III | URS     | Terrlyn Hundebly        | \$56.42                           | 12                      | \$677.04                  |
| <b>Total URS Labor</b>                |         |                         |                                   |                         | <b>\$89,074.40</b>        |

### Sub-consultant Labor

| Labor Classification              | Company                    | Name of Person Assigned | Base Rate | Burdened Rate | Burdened Rate Including OH/Profit | Labor Hrs. This Invoice | Total Amount This Invoice |
|-----------------------------------|----------------------------|-------------------------|-----------|---------------|-----------------------------------|-------------------------|---------------------------|
| Design Manager                    | Total Project Strategies   | Tom Milner              | \$52.89   | \$65.95       | \$95.66                           | 160                     | \$15,305.60               |
| Project Manager 2                 | Keith & Associates         | Jason Fair              | \$45.64   | \$56.91       | \$83.06                           | 224                     | \$18,605.44               |
| Project Manager 2                 | Keith & Associates         | Jason Fair              | \$45.64   | \$56.91       | \$83.06                           | 176                     | \$14,618.56               |
| Project Manager 2                 | Keith & Associates         | Jennifer Preston        | \$38.47   | \$47.97       | \$70.02                           | 188                     | \$13,263.36               |
| Project Manager 2                 | D. Stephenson Construction | Stanford Francis        | \$40.87   | \$42.09       | \$74.38                           | 96                      | \$7,140.48                |
| Project Manager 2                 | D. Stephenson Construction | Stanford Francis        | \$40.87   | \$42.09       | \$74.38                           | 120                     | \$8,926.00                |
| <b>Total Sub-consultant Labor</b> |                            |                         |           |               |                                   |                         | <b>\$76,359.44</b>        |
| <b>Total Labor</b>                |                            |                         |           |               |                                   |                         | <b>\$165,733.84</b>       |

### Reimbursable Expenses (Mileage) This Invoice

| Labor Classification                         | Company                    | Name of Person Assigned | Mileage Rate | Miles This Period | Total Mileage This Invoice |
|--|----------------------------|-------------------------|--------------|-------------------|----------------------------|
| Project Manager 2                            | D. Stephenson Construction | Stanford Francis        | 0.56         | 211.79            | \$118.60                   |
| Project Manager 2                            | Keith & Associates         | Jason Fair              | 0.56         | 118.75            | \$66.50                    |
| Project Manager 2                            | Keith & Associates         | Jason Fair              | 0.56         | 93.44             | \$52.33                    |
| Executive Program Manager                    | URS                        | Steve Baumal            | 0.56         | 200.00            | \$112.00                   |
| Program Controls/Clerk Specialist            | URS                        | Natalie DuQuesnay       | 0.56         | 409.00            | \$229.04                   |
| Program Manager                              | URS                        | Robert Stagliano        | 0.56         | 75.00             | \$42.00                    |
| <b>Total Reimbursable Expenses (Mileage)</b> |                            |                         |              |                   | <b>\$620.47</b>            |

### Reimbursable Expenses (Parking/Tolls) This Invoice

| Labor Classification                               | Company                    | Name of Person Assigned | Parking/Tolls | Total Parking/Tolls This Invoice |
|--|----------------------------|-------------------------|---------------|----------------------------------|
| Project Manager 2                                  | D. Stephenson Construction | Stanford Francis        |               | \$3.33                           |
| Project Manager 2                                  | Keith & Associates         | Jason Fair              |               | \$1.02                           |
| <b>Total Reimbursable Expenses (Parking/Tolls)</b> |                            |                         |               | <b>\$4.35</b>                    |

Total Reimbursable Expenses \$624.82

**TOTAL INVOICE \$166,358.66**



FACILITIES AND CONSTRUCTION

2014 NOV 5 AM 11:32



The School Board of Broward County, Florida  
Office of Facilities & Construction  
3775 S.W. 16<sup>th</sup> Street, Fort Lauderdale, FL 33312  
(754) 321-1500

URS 9603 - P.001599

Program Manager's Invoice

Date: 10/24/2014

Invoice No: 6039983

SBBC PO No. 7514007974

ATP No. 01 & 02

Program Manager: Stephen Baurnal  
Remit to address: URS Corporation Southern  
P.O. Box 116183  
Atlanta GA 30368-6183

Invoice From: 7/1/2014 - 9/30/2014

|               |  |
|---------------|--|
| \$ 437,592.00 |  |
| \$ 875,184.00 |  |

**INVOICE TOTALS:**

|                     |                      |                      |                     |                     |
|---------------------|----------------------|----------------------|---------------------|---------------------|
| Program Mgmt. Svcs. | \$ 867,084.00        | \$ 412,544.29        | \$364,412.16        | \$ 90,127.55        |
| Reimbursable        | \$ 8,100.00          | \$ 787.30            | \$ 1,023.31         | \$ 6,289.39         |
| <b>Total:</b>       | <b>\$ 875,184.00</b> | <b>\$ 413,331.59</b> | <b>\$365,435.48</b> | <b>\$ 96,416.93</b> |

**BASIC FEE TOTALS**

|                                  |         |               |     |               |      |              |     |
|----------------------------------|---------|---------------|-----|---------------|------|--------------|-----|
| DISTRICT WIDE PROGRAM MANAGEMENT | 3937.00 | \$ 413,331.59 | 47% | \$ 365,435.48 | 42 % | \$96,416.93  | 11% |
| Total Previously Billed:         |         | \$ 413,331.59 |     |               |      |              |     |
| Total Amount This Invoice:       |         |               |     | \$ 365,435.48 |      |              |     |
| Total Balance:                   |         |               |     |               |      | \$ 96,416.93 |     |

|  |   |   |  |
|--|---|---|--|
| <b>Submitted By:</b><br>Name: Stephen Baurnal<br>Title: Executive Program Manager<br>Date: 10/31/2014<br>(Signature) | <b>Certified By:</b><br>Name:<br>Title: Project Manager<br>Date: N/A<br>(Signature) | <b>Recommended By:</b><br>Name:<br>Title:<br>Date: N/A<br>(Signature) | <b>Approved By:</b><br>Name: SHELLY MELTON<br>Title: EXEC. DIR.<br>Date: 11/20/14<br>(Signature) |
|--|---|---|--|

The School Board of Broward County, Florida  
Professional Services Agreement - Attachment 2  
July 23, 2013

Program Manager's Invoice Format  
Page 2 of 3

# EXHIBIT R

Project Name: Breward Co. Schools PM Svcs.  
 Project No.: 12005873  
 Invoice No.: 6039593  
 Invoice Period: 7/1/2014 Thru 5/30/2014



| Description                 | Contract Amount     | Total Billings      | Current Billing    | Current Balance     |
|-----------------------------|---------------------|---------------------|--------------------|---------------------|
| Description - ATP I - Labor | \$429,492.00        | \$419,488.89        | \$0.00             | \$18,003.11         |
| Description - ATP D - Labor | \$427,592.00        | \$384,482.15        | \$85,963.65        | \$347,518.45        |
| Description - Reimbursable  | \$9,100.00          | \$1,468.61          | \$6,493.59         | \$1,022.31          |
| <b>Totals</b>               | <b>\$866,184.00</b> | <b>\$777,767.07</b> | <b>\$92,457.24</b> | <b>\$366,543.66</b> |

Invoice Summary - 06039593

| Description                    | Contract Amount     | Total Billings      | Current Billing    | Current Balance     |
|--------------------------------|---------------------|---------------------|--------------------|---------------------|
| Line 1 - Labor                 | \$497,094.00        | \$777,100.45        | \$49,963.65        | \$396,412.17        |
| Line 2 - Reimbursable Expenses | \$9,100.00          | \$1,468.61          | \$6,493.59         | \$1,022.31          |
| <b>Totals</b>                  | <b>\$506,194.00</b> | <b>\$778,569.06</b> | <b>\$56,457.24</b> | <b>\$397,434.48</b> |

Professional Fees

URS Labor

| Labor Classification                  | Company | Name of Person Assigned | Burdened Rate Including O/H/Profit | Labor Hrs. This Invoice | Total Amount This Invoice |
|---------------------------------------|---------|-------------------------|------------------------------------|-------------------------|---------------------------|
| Executive Program Manager             | URS     | Steve Baumel            | \$135.81                           | 482                     | \$57,277.42               |
| Program Control/Clerk Specialist IV   | URS     | Natalie DuQuasnoy       | \$61.75                            | 421                     | \$25,818.75               |
| Senior Project Manager                | URS     | Daniel Munich           | \$119.45                           | 604                     | \$71,688.80               |
| Project Manager I                     | URS     | Robert Stagliano        | \$119.02                           | 492                     | \$58,557.84               |
| Document Control/Clerk Specialist III | URS     | Pharmena Tomesino       | \$56.42                            | 232                     | \$13,089.44               |
| Document Control/Clerk Specialist III | URS     | Deborah Harris          | \$56.42                            | 184                     | \$10,381.28               |
| <b>Total URS Labor</b>                |         |                         |                                    |                         | <b>\$228,959.73</b>       |

Sub-consultant Labor

| Labor Classification              | Company                    | Name of Person Assigned | Base Rate | Burdened Rate | Burdened Rate Including O/H/Profit | Labor Hrs. This Invoice | Total Amount This Invoice |
|-----------------------------------|----------------------------|-------------------------|-----------|---------------|------------------------------------|-------------------------|---------------------------|
| Design Manager                    | Total Project Strategies   | Tom Miner               | \$52.89   | \$55.85       | \$96.26                            | 176                     | \$16,941.76               |
| Design Manager                    | Total Project Strategies   | Tom Miner               | \$52.89   | \$55.85       | \$96.26                            | 180                     | \$17,326.80               |
| Project Manager 2                 | Keth & Associates          | George Probst           | \$42.71   | \$43.35       | \$77.83                            | 120                     | \$9,339.60                |
| Project Manager 2                 | Keth & Associates          | Jennifer Preston        | \$39.47   | \$47.97       | \$70.02                            | 168                     | \$11,763.36               |
| Project Manager 2                 | Keth & Associates          | Jason Fair              | \$45.64   | \$56.91       | \$83.66                            | 168                     | \$14,054.88               |
| Project Manager 2                 | Keth & Associates          | Jason Fair              | \$45.64   | \$56.91       | \$83.66                            | 176                     | \$14,614.96               |
| Project Manager 2                 | Keth & Associates          | Jennifer Preston        | \$39.47   | \$47.97       | \$70.02                            | 176                     | \$12,323.52               |
| Project Manager 2                 | D. Stephenson Construction | Anthony Walsh           | \$42.79   | \$53.36       | \$77.88                            | 176                     | \$13,706.88               |
| Project Manager 2                 | D. Stephenson Construction | Stanford Francis        | \$40.87   | \$42.09       | \$74.34                            | 176                     | \$13,083.84               |
| Project Manager 2                 | D. Stephenson Construction | Stanford Francis        | \$40.87   | \$42.09       | \$74.34                            | 188                     | \$13,875.84               |
| <b>Total Sub-consultant Labor</b> |                            |                         |           |               |                                    |                         | <b>\$194,412.83</b>       |
| <b>Total Labor</b>                |                            |                         |           |               |                                    |                         | <b>\$423,372.56</b>       |

Reimbursable Expenses (Mileage) This Invoice

| Labor Classification                         | Company                    | Name of Person Assigned | Mileage Rate | Miles This Period | Total Mileage This Invoice |
|--|----------------------------|-------------------------|--------------|-------------------|----------------------------|
| Project Manager 2                            | D. Stephenson Construction | Stanford Francis        | 0.56         | 230.41            | \$129.03                   |
| Project Manager 2                            | D. Stephenson Construction | Stanford Francis        | 0.56         | 246.33            | \$137.96                   |
| Project Manager 2                            | Keth & Associates          | Jason Fair              | 0.56         | 178.90            | \$100.18                   |
| Project Manager 2                            | Keth & Associates          | Jason Fair              | 0.56         | 122.66            | \$68.69                    |
| Project Manager 2                            | Keth & Associates          | George Probst           | 0.56         | 90.80             | \$50.85                    |
| Executive Program Manager                    | URS                        | Steve Baumel            | 0.56         | 238.64            | \$132.47                   |
| Program Manager                              | URS                        | Robert Stagliano        | 0.56         | 765.00            | \$428.80                   |
| <b>Total Reimbursable Expenses (Mileage)</b> |                            |                         |              |                   | <b>\$1,017.88</b>          |

Reimbursable Expenses (Parking/Tolls) This Invoice

| Labor Classification                               | Company                    | Name of Person Assigned | Parking/Tolls | Total Parking/Tolls This Invoice |
|--|----------------------------|-------------------------|---------------|----------------------------------|
| Project Manager 2                                  | D. Stephenson Construction | Stanford Francis        | \$3.06        | \$3.06                           |
| Project Manager 2                                  | D. Stephenson Construction | Stanford Francis        | \$3.39        | \$3.39                           |
| Project Manager 2                                  | Keth & Associates          | George Probst           | \$2.46        | \$2.46                           |
| <b>Total Reimbursable Expenses (Parking/Tolls)</b> |                            |                         |               | <b>\$8.91</b>                    |

Total Reimbursable Expenses \$1,022.31

**TOTAL INVOICE \$366,436.49**

| A   | B   | C                           | D                | E   | F                          | G   | H                            | I   | J                          |
|---|---|-----------------------------|------------------|---|----------------------------|---|------------------------------|---|----------------------------|
| <b>OCA Analysis of Three URS Invoices</b> |   |                             |                  |   |                            |   |                              |   |                            |
| Labor Classification                      | Labor Rates Approved by Board on January 22, 2014 (See Exhibit M) | URS Labor Rates on Invoices | Variance (B - C) | URS Invoice No. 5929083 Hours (See Exhibit P) | Overbilling by URS (D * E) | URS Invoice No. 6017151 Hours (See Exhibit Q) | Overbilling by URS (D * G)   | URS Invoice No. 6039983 Hours (See Exhibit R) | Overbilling by URS (D * I) |
| 1   |   |                             |                  |   |                            |   |                              |   |                            |
| 2   |   |                             |                  |   |                            |   |                              |   |                            |
| 3   |   |                             |                  |   |                            |   |                              |   |                            |
| 4   |   |                             |                  |   |                            |   |                              |   |                            |
| 5   |   |                             |                  |   |                            |   |                              |   |                            |
| 6   | \$ 134.78   | \$ 135.61                   | \$ (0.83)        | 453   | \$ (375.99)                | 150   | \$ (124.50)                  | 422   | \$ (350.26)                |
| 7   | \$ 81.24  | \$ 81.75                    | \$ (0.51)        | 512   | \$ (261.12)                | 174   | \$ (98.74)                   | 421   | \$ (214.71)                |
| 8   | \$ 117.70   | \$ 118.45                   | \$ (0.75)        | 408   | \$ (306.00)                | 176   | \$ (132.00)                  | 504   | \$ (378.00)                |
| 9   | \$ 110.32   | \$ 111.02                   | \$ (0.70)        | 256   | \$ (179.20)                | 160   | \$ (112.00)                  | 492   | \$ (344.40)                |
| 10  | \$ 56.07  | \$ 56.42                    | \$ (0.35)        | 252   | \$ (88.20)                 | 140   | \$ (49.00)                   | 426   | \$ (149.10)                |
| 11  | \$ 95.66  | \$ 96.26                    | \$ (0.60)        | 200   | \$ (120.00)                | 0   | \$ -                         | 176   | \$ (105.60)                |
| 12  | \$ 95.66  | \$ 96.26                    | \$ (0.60)        | 40  | \$ (24.00)                 | 0   | \$ -                         | 168   | \$ (100.80)                |
| 13  | \$ 69.58  | \$ 70.02                    | \$ (0.44)        | 0   | \$ -                       | 0   | \$ -                         | 0   | \$ -                       |
| 14  | \$ 68.73  | \$ 69.16                    | \$ (0.43)        | 64  | \$ (27.52)                 | 120   | \$ (51.60)                   | 0   | \$ -                       |
| 15  | \$ 77.77  | \$ 78.26                    | \$ (0.49)        | 0   | \$ -                       | 0   | \$ -                         | 0   | \$ -                       |
| 16  | \$ 90.43  | \$ 91.00                    | \$ (0.57)        | 0   | \$ -                       | 0   | \$ -                         | 0   | \$ -                       |
| 17  |   |                             |                  |   | \$ (1,382.03)              |   | \$ (557.84)                  |   | \$ (1,642.87)              |
| 18  |   |                             |                  |   |                            |   | <b>Total Credit Due SBBC</b> |   | <b>\$ (3,582.74)</b>       |



**AGENDA REQUEST FORM**  
THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA

**EXHIBIT**

|                                      |                                     |
|--------------------------------------|-------------------------------------|
| Final Change Order Request           |                                     |
| <input type="radio"/> Yes            | <input checked="" type="radio"/> No |
| Time                                 |                                     |
| Open Agenda                          |                                     |
| <input checked="" type="radio"/> Yes | <input type="radio"/> No            |

|              |  |
|--------------|--|
| MEETING DATE | Nov 12 2014 10:15AM - Regular School Board Meeting |
| AGENDA ITEM  | OPEN ITEMS   |
| CATEGORY     | JJ. OFFICE OF FACILITIES AND CONSTRUCTION          |
| DEPARTMENT   | Facilities & Construction                          |

ITEM No.:

JJ-1.

TITLE:

Final Change Order Riverglades Elementary Advanced Roofing, Inc.Tile Roof Replacement Project No. P.001442

REQUESTED ACTION:

Approve the Final Change Order, Riverglades Elementary, Advanced Roofing, Inc., Tile Roof Replacement, Project No. P.001442, in the amount of \$51,181.37, CREDIT, -0- days.

SUMMARY EXPLANATION AND BACKGROUND:

Final Change Order, \$51,181.37, CREDIT, -0- days  
 Riverglades Elementary  
 Advanced Roofing, Inc.  
 Tile Roof Replacement  
 Project No. P.001442  
 Refer to Exhibits 1 and 3 for detailed information.

SCHOOL BOARD GOALS:

Goal 1: High Quality Instruction     Goal 2: Continuous Improvement     Goal 3: Effective Communication

FINANCIAL IMPACT:

A positive financial impact of \$51,181 will be added to the Capital Projects Reserve.

EXHIBITS: (List)

(1) Executive Summary (2) Change Order Analysis (3) Change Order (4) Change Order Summary to date (5) Collaboration Form

BOARD ACTION:

(For Official School Board Records Office Only)

SOURCE OF ADDITIONAL INFORMATION:

|                                      |                     |
|--------------------------------------|---------------------|
| Name: Rob Stagliano, Project Manager | Phone: 754-321-1531 |
| Name:                                | Phone:              |

**THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA**

Senior Leader & Title  
Derek Messier - Chief Facilities Officer

Signature  
Derek Robert Messier  
Tuesday, November 04, 2014 3:31:10 PM

Approved In Open Board Meeting On: \_\_\_\_\_

By: \_\_\_\_\_

School Board Chair

Electronic Signature  
Form #4189 Revised 12/12  
RWR/DM/SNM/SVC/SB/DM/RS:ma

# EXHIBIT T



The School Board of Broward County, Florida  
 Office of Facilities & Construction  
 3775 SW 16<sup>th</sup> Street  
 Fort Lauderdale, Florida 33312

FACILITIES AND  
 CONSTRUCTION

2014 SEP 18 PM 2:11

(754) 321-1500

## Document 01250g (00 63 63)-Construction Change Order-Item # 1

Facility Name: Riverglades Elementary School Date: 9/2/14  
 Project Name: Tile Roof Project # P.001442  
 Location No: 2891  
 Project Description: Complete Punch List on Tile Roof  
 Contractor: Advanced Roofing, Inc. Reference Letter Dated: 8/19/14(Change Order Req. No.1)

### Description of Change:

Delete scope of work associated with removal & disposal of existing gutters (332 LF) and downspouts (90 LF). Delete scope of work associated with furnish & installation of new 22 gauge stainless steel gutters (332 LF) and downspouts (90 LF). Delete scope of work associated with TPO membrane on walls above tile roof (100 LF in two locations) based on discussions in meeting held on July 16, 2014. Install new downspout to match existing gutter & downspout system at South Stair Tower.

Attachments: Advanced Roofing Change Order No. 1 dated 8/27/14

### Reason For Change:

Scope reduction based on comments from Building Department Plan Review.

### Summary:

Total of Credits and/or Added Costs:

Add: \$

Deduct: \$51,181.37

The Contract Time will be (increased) (decreased) by:

0 Days

**THIS CHANGE ORDER ITEM IS INCLUSIVE OF ALL COSTS ASSOCIATED WITH THIS WORK. NO ADDITIONAL COMPENSATION FOR EXTENDED TIME SHALL BE DUE AS A RESULT OF THIS CHANGE IN THE SCOPE OF WORK.**

Recommended

Project Consultant's Signature Date 9/15/14

SHIBAO ALI  
 Project Consultant's Typed Name

ATLANTIC & CARIBBEAN BUIL. CONSULT.  
 Project Consultant's Firm Name

Accepted

Contractor's Signature Date 9/11/14

Jim Loftus  
 Contractor's Typed Name  
ADVANCED ROOFING INC.  
 Contractor's Firm Name

Contractor's Firm Name

Reviewed and Concurred

Facilities Project Manager Date 9-18-14

ROB STAGLIANO  
 Facilities Project Manager's Typed Name

The School Board of Broward County, FL

This information to be completed by School Board of Broward County Staff

### Change Order Categories

Owner's Request  Unforeseen  Consultant Error  Consultant Omission

### Sub Categories

Regulatory Compliance  Safety/Emergency



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

5401303234

**FILE COPY**  
 FACILITIES AND  
 CONSTRUCTION-0505

CAPITAL PAYMENTS  
 Pt 3:11

SEP 22 11:31 AM  
 Document 01290a (00 62 76)-Application for Payment

SEP 18 AM 11:55

To: The School Board of Broward County, Florida

(Owner via Project Consultant)  
 Project No: P.001469  
 Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)  
 Facility Name: Watkins Elementary School  
 Location No: 0511

|                    |                      |                                      |
|--------------------|----------------------|--------------------------------------|
| Application No.: 1 | Period To: 9/15/2014 | SBBC Purchase Order No.: 75140107445 |
|                    |                      | 7514010746                           |

Contractor: Koldaire Inc.

| Change Order Summary   |               | Additions | Deductions |
|--|---------------|-----------|------------|
| Change Orders approved by the School Board in previous months. |               |           |            |
| Total:   |               |           |            |
| Approved this Month:   | Date Approved |           |            |
| Number   |               |           |            |
| Totals   |               |           |            |
| Net change by Change Orders:                                   |               |           |            |

The undersigned contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this application for payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner and that current payment shown herein is now due.

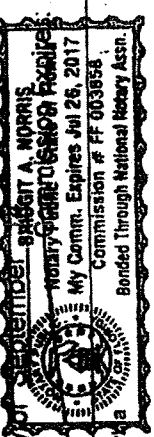
Contractor: Koldaire, Inc - Frank Monti

By: (Signature) *Frank U. Monti* Date: 9/16/104

State of Florida Broward County

Notarization

Sworn Before me on this 16 day of September 2010



Notary Public:

The School Board of Broward County, Florida  
 June 11, 2013

Application is made for Payment, as shown below, in connection with the Contract. The Contractors updated Document 00435-Schedule of Values is attached as a continuation/detail sheet.

1. ORIGINAL CONTRACT SUM \$ 38,000.00
2. NET CHANGE BY CHANGE ORDERS \$ 0
3. CONTRACT SUM TO DATE (Line 1 plus or minus line 2) \$ 38,000.00
4. TOTAL COMPLETED AND STORED TO DATE (Column H of Document 00435) \$ 6,300.00
5. RETAINAGE
  - a. 10 % of Completed Work \$ 630.00 (Column E + F of Document 00435)
  - b. 10 % of Completed Work \$ (Column E + F of Document 00435)
 Total Retainage (Line 5a + 5b or total in Column K on Document 00435) \$ 630.00
6. TOTAL EARNED LESS RETAINAGE (Line 4 less Line 5 Total) \$ 5,670.00
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Line 6 from previous certificate) \$ 0.00
8. CURRENT PAYMENT DUE (Enter this amount on Line 10 next page) \$ 5,670.00
9. BALANCE TO FINISH, PLUS RETAINAGE (Line 3 less Line 6) \$ 32,330.00

SENT TO CAPITAL PAYMENTS

9-30-14

Document 01290a-Application for Payment

Project Consultant's Certificate for Payment

In accordance with the Contract Documents, based on on-site observations and the data comprising the above application, the Project Consultant certifies to the Owner that to the best of his knowledge, information and belief, the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment in the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 5,670.00 (Attach explanation if amount certified differs from the amount applied for.)

Project Consultant [Signature] Date: 9/16/14 (Signature)

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

OWNER'S APPROVAL

10. AMOUNT APPROVED \$ 5,670.00 (Attach explanation if amount approved differs from the amount certified above.)

Approved for Payment by:

Project Manager:

By: [Signature] Date: 9-24-14 (Signature)

Executive Director, Facilities Design & Construction or Designee:

By: [Signature] Date: 9/26/14 (Signature)

Chief Facilities & Construction Officer

By: [Signature] Date: [Signature]

This Approval is not negotiable. The AMOUNT APPROVED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.



The School Board of Broward County, Florida  
 Supply Management & Logistics Department  
 7720 W. Oakland Park Blvd., Suite 323  
 Sunrise, Florida 33351

5401311415  
 FACILITIES AND  
 CONSTRUCTION

(754) 321-0505

2014 OCT 3 PM 4:10

**2014 OCT 3 PM 4:10 - Document 01290a (00 62 76)-Application for Payment**

To: The School Board of Broward County, Florida

Project No: (Owner via Project Consultant)  
 P.001469  
 Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)  
 Facility Name: Watkins Elementary School  
 Location No: 0511

Contractor: Koldaire Inc.

|                    |                    |  |
|--------------------|--------------------|--|
| Application No.: 2 | Period To: 9/30/14 | SBBC Purchase Order No.: 75149107415<br>7514910745 |
|--------------------|--------------------|--|

| Change Order Summary   |               |            |
|--|---------------|------------|
| Change Orders approved by the School Board in previous months. | Additions     | Deductions |
| Approved this Month:<br>Number                                 | Date Approved |            |
| Totals   |               |            |
| Net change by Change Orders:                                   |               |            |

The undersigned contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this application for payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner and that current payment shown herein is now due.

Contractor: Koldaire, Inc - Frank Monti

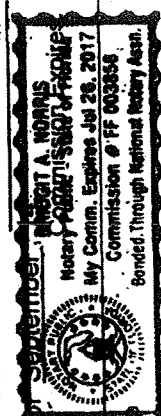
Date: 9/26/14

By: (Signature) *Frank Le Monti*

State of Florida Broward County

Notarization

Sworn Before me on this 26 day of September, 2014



Notary Public: *[Signature]*

The School Board of Broward County, Florida  
 June 11, 2013

Application is made for Payment, as shown below, in connection with the Contract. The Contractors updated Document 00435-Schedule of Values is attached as a continuation/detail sheet.

1. ORIGINAL CONTRACT SUM \$ 38,000.00
2. NET CHANGE BY CHANGE ORDERS \$ 0
3. CONTRACT SUM TO DATE \$ 38,000.00  
(Line 1 plus or minus line 2)
4. TOTAL COMPLETED AND STORED TO DATE \$ 38,000.00  
(Column H of Document 00435)
5. RETAINAGE  
 a. 10 % of Completed Work \$ 630.00  
 (Column E + F of Document 00435)  
 b. 10 % of Completed Work \$ \_\_\_\_\_  
 (Column E + F of Document 00435)  
 Total Retainage (Line 5a + 5b or total in Column K on Document 00435) \$ 3,800.00
6. TOTAL EARNED LESS RETAINAGE \$34,200.00  
(Line 4 less Line 5 Total)
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT \$5,670.00  
(Line 6 from previous certificate)
8. CURRENT PAYMENT DUE \$28,530.00  
(Enter this amount on Line 10 next page)
9. BALANCE TO FINISH, PLUS RETAINAGE \$3,800.00  
(Line 3 less Line 6)

SENT TO CAPITAL PAYMENTS

10-23-14



0511-P.001469

Document 01290a-Application for Payment

Project Consultant's Certificate for Payment

In accordance with the Contract Documents, based on on-site observations and the data comprising the above application, the Project Consultant certifies to the Owner that to the best of his knowledge, information and belief, the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment in the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 28,530 (Attach explanation if amount certified differs from the amount applied for.) Project Consultant By: [Signature] Date: 9/26/14

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

OWNER'S APPROVAL

10. AMOUNT APPROVED \$ 28,530.00 (Attach explanation if amount approved differs from the amount certified above.)

Approved for Payment by: Project Manager: [Signature] Date: 10-21-14

Executive Director, Facilities Design & Construction of Designee: By: [Signature] Date: 10/21/14

Chief Facilities & Construction Officer By: [Signature] Date: [Signature]

This Approval is not negotiable. The AMOUNT APPROVED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.



**Supply Management & Logistics Department FACILITIES AND  
7720 W. Oakland Park Blvd., Suite 3200 CONSTRUCTION**

1900754592

**CAPITAL PAYMENTS**

**2011 OCT 23 PM 2:41** **2011 OCT 22 AM 11:54** (754) 321-0505

**Document 01290a (00 62 76)-Application for Payment**

To: The School Board of Broward County, Florida

(Owner via Project Consultant)  
Project No: P.001469  
Project Title: Safety/Ventilation (AC Bldg. 1 Room 103F)  
Facility Name: Watkins Elementary School  
Location No: 0511

|                            |                     |                                      |
|----------------------------|---------------------|--------------------------------------|
| Application No.: 3 - Final | Period To: 10/14/14 | SBBC Purchase Order No.: 751401074/5 |
|                            |                     | No.: 1514010745                      |

Contractor: Koldaire Inc.  
13043

| Change Order Summary         |           |            |
|------------------------------|-----------|------------|
| Approved this Month:         | Additions | Deductions |
| Number                       |           |            |
| Date Approved                |           |            |
| Totals                       |           |            |
| Net change by Change Orders: |           |            |

The undersigned contractor certifies that to the best of the Contractor's knowledge, information and belief the Work covered by this application for payment has been completed in accordance with the Contract Documents, that all amounts have been paid by the Contractor for Work for which previous Certificates for Payment were issued and payments received from the Owner and that current payment shown herein is now due.

Contractor: Koldaire, Inc - Frank Monti

By: (Signature) *Frank LeMonte Jr* Date: 10/14/14

Notarization State of Florida, Broward County

Sworn Before me on this 14 day of October, 2011, at the State of Florida  
Notary Public - My Comm. Expires 07/05/15-3807 Expires:

Notary Public: *[Signature]* Commission # PF 003856, Bonded Through National Notary Assn.

The School Board of Broward County, Florida  
June 11, 2013

Application is made for Payment, as shown below, in connection with the Contract. The Contractors updated Document 00435-Schedule of Values is attached as a continuation/detail sheet.

1. ORIGINAL CONTRACT SUM \$ 38,000.00
2. NET CHANGE BY CHANGE ORDERS \$ 0
3. CONTRACT SUM TO DATE (Line 1 plus or minus line 2) \$ 38,000.00
4. TOTAL COMPLETED AND STORED TO DATE (Column H of Document 00435) \$ 38,000.00
5. RETAINAGE
  - a. 0 % of Completed Work \$ 0.00 (Column E + F of Document 00435)
  - b. 0 % of Completed Work \$ (Column E + F of Document 00435)
 Total Retainage (Line 5a + 5b or total in Column K on Document 00435) \$ 0
6. TOTAL EARNED LESS RETAINAGE (Line 4 less Line 5 Total) \$38,000.00
7. LESS PREVIOUS CERTIFICATES FOR PAYMENT (Line 6 from previous certificate) \$34,200.00
8. CURRENT PAYMENT DUE (Enter this amount on Line 10 next page) \$3,800.00
9. BALANCE TO FINISH, PLUS RETAINAGE (Line 3 less Line 6) \$ 0

Project Consultant's Certificate for Payment

In accordance with the Contract Documents, based on on-site observations and the data comprising the above application, the Project Consultant certifies to the Owner that to the best of his knowledge, information and belief, the Work has progressed as indicated, the quality of the Work is in accordance with the Contract Documents, and the Contractor is entitled to payment in the AMOUNT CERTIFIED.

AMOUNT CERTIFIED \$ 3800.00
(Attach explanation if amount certified differs from the amount applied for.)
Project Consultant
By: [Signature] Date: 10/10/14

This Certificate is not negotiable. The AMOUNT CERTIFIED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

OWNER'S APPROVAL

10. AMOUNT APPROVED 3,800.00
(Attach explanation if amount approved differs from the amount certified above.)

Approved for Payment by:

Project Manager: [Signature] Date: 10-28-14

Executive Director, Facilities Design & Construction or Designee:


By: [Signature] Date: 11/2/14

Chief Facilities & Construction Officer

By: [Signature] Date: 12/2/14

This Approval is not negotiable. The AMOUNT APPROVED is payable only to the Contractor named herein. Issuance, payment and acceptance of payment are without prejudice to any rights of the Owner or Contractor under this Contract.

Printed by: **Gerardo Usallan**  
 Tuesday, January 06, 2015 2:32:20 PM

From: **Aston A. Henry** Tuesday, January 06, 2015 2:07:05 PM   
 Subject: **Re: Approval Procedure for Construction Contracts**  
 To: **Gerardo Usallan**  
 Cc: **Patrick O. Reilly Robert Goode April Kowalski**

Aston, regarding the four projects listed below, we have the following questions.

1 Did the Office of Facilities & Construction contact Risk Management prior to the issuance of a Notice to Proceed in order to verify that all insurance requirements were met, as required by the attached RMD procedure? No. The Office of Facilities & Construction Management did not contact Risk Management prior to issuance of a Notice To Proceed (NTP). See details below.

Advanced Roofing, Inc., Atlantic Technical Center, Project No. P001527 -- NTP issued 6.23.14, Risk Management received documents on 10.7.14

Advanced Roofing, Inc., Riverglades Elementary, Project No. P001442 - -NTP not received prior to Certificate of Completion signed 9.17.14 and received in Risk Management on 10.22.14 - Risk Management Compliance Approval issued on contract warranty only.

Koldaire, Inc., Watkins Elementary, Project No. P001469 - -NTP issued 6.26.14, Risk Management received documents on 7.11.14










Koldaire, Inc., Hollywood Hills High, Project No. P000991 - NTP issued 6.26.14, Risk Management received documents 7.11.14

2. Do these projects currently meet all of our insurance requirements?

Advanced Roofing, Inc., Atlantic Technical Center, Project No. P001527 **Yes**  
 Advanced Roofing, Inc., Riverglades Elementary, Project No. P001442 **Yes**  
 Koldaire, Inc., Watkins Elementary, Project No. P001469 **Yes**  
 Koldaire, Inc., Hollywood Hills High, Project No. P000991 **Yes**

Please advise as soon as possible. Thanks.

Printed by: Gerardo Usallan  
Tuesday, January 06, 2015 4:03:18 PM

From:  **Aston A. Henry** Monday, January 05, 2015 6:10:50 PM   
Subject: Approval Procedure for Construction Contracts  
To:  **Patrick O. Reilly**  
Cc:  Robert Goode  **Gerardo Usallan**  **Theresa V. Coleman**  
 **April Kowalski**  Derek Messier  Jeffrey S. Moquin

Good Evening Pat.

This email serves as a follow up to my conversation with you and your staff this afternoon. The Risk Management Department has a procedure in place for approval of insurance requirements for construction projects. The process has been in place for a number of years.

Once a contractor/design professional has been awarded a contract, The Facilities and Construction Management Department is required to forward a copy of the contract along with a certificate of insurance to Risk Management. Risk Management reviews insurance requirements along with proper wording to ensure compliance or non-compliance. An approval letter or a non-compliance letter will be issued to the contractor/design professional once our review has been completed. Please note, some approval letters are issued with the exception of Builder's Risk/ Owners and Contractors Protective Liability. Owners and Contractors Protective (OCP) Liability are project specific. Contractors/Design Professionals will obtain Builder's Risk and OCP shortly before a Notice to Proceed (NTP) is issued. The Facilities and Construction Management Department contacts Risk Management prior to issuance of a NTP to verify all insurance requirements have been met.

All Insurance requirements are tracked through an EBIX data base which notifies contractors/design professionals prior to a policy expiration, non-compliance as well as approval.

After reviewing this memo, should additional questions or concerns arise, please feel free to contact me.

Thanks.

Aston A. Henry, Jr. - Director  
Risk Management  
(754) 321-1900  
(754) 321-2654 - Fax


Under Florida law, email addresses are public records. Your email address and the contents of any email sent to the sender of this communication will be released in response to any request for public records, except as excluded by F.S. 119.071, 1002.22(3)(d) [student records], or any other law of the State of Florida. If you do not want your email address to be released as part of any public records request, do not send email to this address, rather contact this office by phone or in writing.



**FILE COPY**

**FACILITIES AND  
CONSTRUCTION**

**2014 DEC -4 AM 7:44**

 **The School Board of Broward County, Florida**  
**Office of Facilities & Construction**  
3775 S.W. 16<sup>th</sup> Street, Fort Lauderdale, FL 33312  
(754) 321-1500

URS 9603-P.001599

**Program Manager's Invoice**

Date: 11/25/2014  
Invoice No: 6065151  
SBB PO No. 7514007974 1515 009304  
ATP No: 01, 02, & 03  
Invoice From: 10/1/2014 - 10/31/2014

**Program Manager:** Stephen Baumal  
**Remit to address:** URS Corporation Southern  
P.O. Box 116183  
Atlanta GA 30368-6183

|                 |  |
|-----------------|--|
| \$ 437,592.00   |  |
| \$ 1,750,369.00 |  |

**INVOICE TOTALS:**

|                     |                        |                      |                      |                      |
|---------------------|------------------------|----------------------|----------------------|----------------------|
| Program Mgmt. Svcs. | \$1,717,969.00         | \$ 776,125.62        | \$ 157,201.82        | \$ 783,810.72        |
| Reimbursable        | \$ 32,400.00           | \$ 2,631.44          | \$ 1,830.83          | \$ 29,758.56         |
| <b>Total:</b>       | <b>\$ 1,750,369.00</b> | <b>\$ 778,757.06</b> | <b>\$ 159,032.65</b> | <b>\$ 813,569.28</b> |

**BASIC FEE TOTALS:**

|                                  |      |               |     |               |    |               |     |
|----------------------------------|------|---------------|-----|---------------|----|---------------|-----|
| DISTRICT WIDE PROGRAM MANAGEMENT | 1678 | \$ 778,757.06 | 44% | \$ 158,032.65 | 9% | \$ 813,569.28 | 46% |
| Total Previously Billed:         |      | \$ 778,757.06 |     |               |    |               |     |
| Total Amount This Invoice:       |      |               |     | \$ 158,032.65 |    |               |     |
| Total Balance:                   |      |               |     |               |    | \$ 813,569.28 |     |

|   |  |   |   |
|---|--|---|---|
| <b>Submitted By:</b><br>Name: Stephen Baumal<br>Title: Executive Program Manager<br>Date: 11/20/2014<br>(Signature) | <b>Certified By:</b><br>Name: <i>DIVINE ANNA</i><br>Title: Project Manager<br>Date: 12/1/14<br>(Signature) | <b>Recommended By:</b><br>Name:<br>Title:<br>Date:<br>(Signature) | <b>Approved By:</b><br>Name:<br>Title:<br>Date: 12/17/14<br>(Signature) |
|---|--|---|---|

The School Board of Broward County, Florida  
Professional Services Agreement - Attachment 2  
July 23, 2013

Program Manager's Invoice Form  
Page 2 of 3

**SENT TO CAPITAL PAYMENTS**  
12-19-14

# EXHIBIT W-3

Project Name: Broward Co. Schools PM Svcs.  
 Project No.: 12806073  
 Invoice No.: 6085151  
 Invoice Period: 10/1/2014 thru 10/31/2014



| Description                   | Amount                | Amount              | Amount              | Amount              |
|-------------------------------|-----------------------|---------------------|---------------------|---------------------|
| Description - ATP I - Labor   | \$437,592.00          | \$437,592.00        | \$0.00              | \$15,047.71         |
| Description - ATP II - Labor  | \$437,492.00          | \$437,492.00        | \$0.00              | \$73,479.94         |
| Description - ATP III - Labor | \$942,785.00          | \$95,974.27         | \$783,810.73        | \$89,974.27         |
| Description - Reimbursables   | \$32,400.00           | \$3,641.44          | \$39,769.60         | \$330.83            |
| <b>Totals</b>                 | <b>\$1,710,269.00</b> | <b>\$935,709.72</b> | <b>\$818,689.20</b> | <b>\$189,022.85</b> |

**Invoice Summary - 6085151**

| Line                           | Amount                | Amount              | Amount              | Amount              |
|--------------------------------|-----------------------|---------------------|---------------------|---------------------|
| Line 1 - Labor                 | \$1,710,269.00        | \$935,709.72        | \$783,810.73        | \$187,391.82        |
| Line 2 - Reimbursable Expenses | \$32,400.00           | \$3,641.44          | \$39,769.60         | \$330.83            |
| <b>Totals</b>                  | <b>\$1,742,669.00</b> | <b>\$939,351.16</b> | <b>\$823,580.33</b> | <b>\$187,722.65</b> |

**Professional Fees**

**URB Labor**

| Laber Classification                | Company | Name of Person Assigned | Burdened Rate Including OHP/Profit | Laber Hrs. This Invoice | Total Amount This Invoice |
|-------------------------------------|---------|-------------------------|------------------------------------|-------------------------|---------------------------|
| Executive Program Manager           | URS     | Stephen Beumal          | \$159.81                           | 101.5                   | \$21,091.62               |
| Program Control/Chief Specialist IV | URS     | Natelle DuQuessay       | \$81.75                            | 100                     | \$15,734.00               |
| Senior Project Manager              | URS     | Daniel Minich           | \$118.45                           | 144                     | \$17,056.80               |
| Project Manager I                   | URS     | Robert Stagliano        | \$111.02                           | 160                     | \$17,763.20               |
| Design Control Professional         | URS     | Robert Lynch            | \$68.00                            | 140                     | \$9,520.00                |
| <b>Total URB Labor</b>              |         |                         |                                    |                         | <b>\$78,295.62</b>        |

**Sub-consultant Labor**

| Laber Classification              | Company                    | Name of Person Assigned | Base Rate | Burdened Rate | Burdened Rate Including OHP/Profit | Laber Hrs. This Invoice | Total Amount This Invoice |
|-----------------------------------|----------------------------|-------------------------|-----------|---------------|------------------------------------|-------------------------|---------------------------|
| Design Manager                    | Total Project Strategies   | Tom Nisaw               | \$62.89   | \$66.95       | \$96.29                            | 100                     | \$18,431.00               |
| Project Manager 2                 | Kath & Associates          | George Proich           | \$52.70   | \$52.35       | \$72.85                            | 100                     | \$12,000.00               |
| Project Manager 2                 | Kath & Associates          | Jennifer Preston        | \$38.47   | \$47.97       | \$70.02                            | 184                     | \$11,463.20               |
| Project Manager 2                 | Kath & Associates          | Jason Fair              | \$46.84   | \$59.91       | \$83.08                            | 160                     | \$13,694.00               |
| Project Manager 2                 | D. Stephenson Construction | Anthony Walsh           | \$42.79   | \$63.36       | \$77.88                            | 160                     | \$13,083.00               |
| Project Manager 2                 | D. Stephenson Construction | Stanford Francis        | \$40.87   | \$42.00       | \$74.80                            | 160                     | \$11,968.00               |
| <b>Total Sub-consultant Labor</b> |                            |                         |           |               |                                    |                         | <b>\$78,669.00</b>        |
| <b>Total Labor</b>                |                            |                         |           |               |                                    |                         | <b>\$157,391.82</b>       |

**Reimbursable Expenses (Mileage) This Invoice**

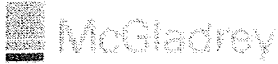
| Laber Classification                         | Company                    | Name of Person Assigned | Mileage Rate | Miles This Period | Total Mileage This Invoice |
|--|----------------------------|-------------------------|--------------|-------------------|----------------------------|
| Project Manager 2                            | D. Stephenson Construction | Stanford Francis        | 0.50         | 167.34            | \$83.67                    |
| Project Manager 2                            | D. Stephenson Construction | Anthony Walsh           | 0.50         | 207.14            | \$103.57                   |
| Project Manager 2                            | Kath & Associates          | Jason Fair              | 0.50         | 648.00            | \$324.00                   |
| Project Manager 2                            | Kath & Associates          | George Proich           | 0.50         | 79.40             | \$39.70                    |
| Program Manager                              | URS                        | Robert Stagliano        | 0.50         | 232.00            | \$116.00                   |
| <b>Total Reimbursable Expenses (Mileage)</b> |                            |                         |              |                   | <b>\$667.54</b>            |

**Reimbursable Expenses**

| Laber Classification               | Company                    | Name of Person Assigned | Amount                          | Total Parking/Tolls This Invoice |
|------------------------------------|----------------------------|-------------------------|---------------------------------|----------------------------------|
| Project Manager 2                  | D. Stephenson Construction | Stanford Francis        | Parking/Tolls                   | \$1.94                           |
| Project Manager 2                  | URS                        | Deborah Hanna           | Fingerprint/Badge Reimbursement | \$93.85                          |
| <b>Total Reimbursable Expenses</b> |                            |                         |                                 | <b>\$95.79</b>                   |

Total Reimbursable Expenses \$669.53  
**TOTAL INVOICE \$159,032.65**





McGladrey, LLP

7351 Office Park Place  
 Melbourne, Florida 32940-8229  
 O 321-751-6200 F 321-751-1385  
 www.mcgladrey.com

August 1, 2014

Derek Messier  
 Division of Facilities and Construction  
 1643 North Harrison Parkway  
 Building H  
 Sunrise, FL 33323

Dear Mr. Messier:

Pursuant to our Engagement Letter dated January 15, 2014, we are reporting the following observations and recommendations related to our monitoring assistance of the third party Program Manager's ("URS Corporation", or "URS") compliance with the terms and conditions of the Program Manager's contract, specifically the submission of **URS Invoice #5929083**.

**Procedures**

McGladrey performed a review of the Program Manager invoice's compliance with the terms and conditions of the contract including:

- Mathematical accuracy
- Rate table compliance
- Proper supporting documentation (time cards, invoices, expense reimbursement forms, etc.)

**Results**

| Article 5.2.3 Compliance - Wage Rates  |              |               |             |                      |
|--|--------------|---------------|-------------|----------------------|
| Observation  |              |               |             |                      |
| Through our review of URS invoice #5929083, we noted that the Program Manager billed for labor utilizing rates that exceeded those enumerated in the Program Management Agreement (Article 5.2.3). This exception was noted for the following classifications: |              |               |             |                      |
| Classification   | Hours Billed | Contract Rate | Actual Rate | Amount               |
| Executive Program Manager  | 453          | \$ 135.63     | \$ 134.78   | \$ (385.05)          |
| Program Controls/Clerk Specialist IV   | 512          | 81.75         | 81.24       | (261.12)             |
| Senior Project Manager   | 408          | 118.45        | 117.70      | (306.00)             |
| Project Manager 1  | 256          | 111.02        | 110.32      | (179.20)             |
| Document Control / Clerk Specialist II   | 252          | 56.42         | 56.07       | (88.20)              |
| Scheduler  | 64           | 69.16         | 68.73       | (27.52)              |
| <b>Credit to Owner</b>   |              |               |             | <b>\$ (1,247.09)</b> |
| Recommendation   |              |               |             |                      |
| We recommend the Owner request a credit for the overbilling of \$1,247.09 notified in the chart above. Further, we recommend the Owner require the Program Manager to utilize the contractually agreed to rates on future invoices.                            |              |               |             |                      |

**SECTION III**  
**FULL TEXT OF MANAGEMENT RESPONSES**

THE SCHOOL BOARD OF BROWARD COUNTY, FLORIDA  
OFFICE OF FACILITIES & CONSTRUCTION


SHELLEY N. MELONI, R.A., NCARB, LEED® AP  
EXECUTIVE DIRECTOR, FACILITIES DESIGN & CONSTRUCTION

Telephone: (754) 321-1515

Facsimile: (754) 321-1501

January 13, 2015

TO: Patrick O. Reilly, Chief Auditor  
Office of the Chief Auditor

FROM: Shelley N. Meloni, R.A., NCARB, LEED® AP   
Executive Director, Facilities Design & Construction

SUBJECT: **MANAGEMENT RESPONSE TO  
CONSTRUCTION SERVICES MINOR PROJECTS (CSMP)  
BID NO. 2014-35-FC  
DRAFT AUDIT REPORT OF FOUR SELECTED PROJECTS**

This is in response to your December 18, 2014 memo to Mr. Messier in which you requested responses for the three (3) findings listed below:

**Finding No. 1:** The Office of Facilities and Construction (OFC) and the Program Manager did not follow certain contractual requirements mandated by the Construction Services Minor Projects (CSMP) contract Bid No. 2014-35-FC, which include M/WBE participation requirements.

**Management Response – Office of Facilities & Construction (OFC)**

*Status: On September 24, 2014, a staff member from the Office of the Chief Auditor (OCA) made an informal visit to the Office of Facilities & Construction (OFC) to review the Construction Services Minor Projects' files. A formal request was then sent to the Chief Facilities Officer on September 30, 2014, requesting specific documents related to four in-progress CSMP projects. The requested documents were subsequently forwarded to OCA on October 21, 2014. OFC is not aware of what was reviewed by the OCA staff member on September 24, 2014, however, when formally requested, OFC provided the necessary documentation which illustrates that the Program Manager is adhering to the requirements of the CSMP contract and process.*

*In addition, the Program Manager is diligently working with all contractors to ensure that the M/WBE participation goals are met or exceeded.*

**Finding No. 2:** The Office of Facilities and Construction (OFC) and the Risk Management Department (RMD) accepted and approved Certificates of Insurance for specific projects under the Construction Services Minor Projects (CSMP) contract that lacked required Owners & Contractors Protective Liability Insurance (OCP) coverage and specific clause language required by the insurance specifications of the General Conditions of the Contract.

**MANAGEMENT RESPONSE TO  
CONSTRUCTION SERVICES MINOR PROJECTS (CSMP)  
BID NO. 2014-35-FC  
DRAFT AUDIT REPORT OF FOUR SELECTED PROJECTS  
PAGE 2**

**Management Response – Office of Facilities & Construction (OFC)**

**Status:** *OFC is continuing to adhere to the terms of the contract with respect to all insurance requirements and is currently in compliance on the projects reviewed as part of this audit.*

*To further ensure compliance, OFC and the Risk Management Department (RMD) have developed a process whereby RMD will sign-off on the Notice to Proceed, signifying compliance with the insurance requirements of the contract.*

**Finding No. 3:** The Office of Facilities & Construction (OFC) approved payments submitted by the Program Manager for invoices that contained labor rates that exceeded the contract's approved labor rates, under RFQ No. 2014-31-FC.

**Management Response – Office of Facilities & Construction (OFC)**

**Status:** *OFC approved invoices submitted by the Program Manager with labor rates that are in compliance with the labor rates approved by the Board on January 22, 2014.*

SNM:ma

c: Derek Messier, Chief Facilities Officer  
Sonja Coley, Senior Project Manager  
Audit Response File, Office of Facilities & Construction

**SECTION IV  
APPENDIX**

## ABBREVIATIONS

|       |   |
|-------|---|
| A/E   | Architect/Engineers                                   |
| AFP   | Application for Payment                               |
| AL    | Automobile Liability Insurance                        |
| BR    | Builder's Risk Insurance                              |
| CCD   | Construction Change Directive                         |
| CCNA  | Consultant's Competitive Negotiations Act             |
| CD    | Construction Documents                                |
| CGL   | Commercial General Liability Insurance                |
| CM    | Construction Manager                                  |
| CO    | Change Order  |
| COI   | Change Order Item                                     |
| CSMP  | Construction Services Minor Projects                  |
| DOE   | Department Of Education                               |
| DOP   | Direct Owner Purchase                                 |
| ECD   | Estimated Completion Date                             |
| E&O   | Errors and Omissions                                  |
| F.S.  | Florida Statutes                                      |
| FBC   | Florida Building Code                                 |
| FHSAA | Florida High School Athletic Association              |
| FLCC  | Fixed Limit Cost of Construction                      |
| FS    | Florida Statutes                                      |
| GMP   | Guaranteed Maximum Price                              |
| HVAC  | Heating, Ventilation and Air Conditioning             |
| LSC   | Life Safety Code                                      |
| N/A   | Not Applicable  |
| NFPA  | National Fire Protection Association                  |
| OCA   | Office of the Chief Auditor                           |
| OCP   | Owners and Contractors Protective Liability Insurance |
| OFC   | Office of Facilities & Construction                   |
| OR    | Owner's Request                                       |
| PM    | Project Manager                                       |
| PO    | Purchase Order  |
| PPO   | Physical Plant Operations                             |
| PSA   | Professional Services Agreement                       |
| RAF   | Regional Athletic Facility                            |
| RMD   | Risk Management Department                            |
| RSBM  | Regular School Board Meeting                          |
| SBBC  | School Board of Broward County or the Board           |
| SREF  | State Requirements for Educational Facilities         |
| UBCI  | Uniform Building Code Inspector                       |
| UC    | Unforeseen Condition                                  |
| WC    | Worker's Compensation Insurance                       |