

**AFPD N40, Owners Rep RFP**

Description	Type Five Sebastian Wanatowicz	Dynamic Colleen Kaneda	Project Resource Don Carpenter	Comments
Home office	Carbondale	Eagle	Carbondale	
Primary contact	Sebastian Wanatowicz	Chris Penney	Don Carpenter	
Estimated average hours/wk.	15.00	19.00	12.50	
Estimated average hours/mo.	65.00	81.00	53.75	
Hourly rate based on fixed fee	145.00	131.15	171.16	
Total hours +/-	1,040.00	1,296.00	860.00	Based on 16 months total
Fee type	Hourly	Lump sum	monthly fixed fee	
Fee per month	10,255.00	10,623.00	9,200.00	
Total fee			151,800.00	Based on 16 mo. duration and one month after CO
Total fee		187,922.00		Based on 16 mo. duration and two months after CO
Total fee	153,823.00			Based on 15 months
Adjusted total fee	164,078.00	178,067.00 with reimbursables	142,600.00	Based on 15 mo. duration and one month after CO
Hourly rate for Don Carpenter			190.00	Additional services
Hourly rate for Development managers			170.00	
Hourly rate Colleen Kaneda		140.00		
Chris Penney		135.00		
Reilly O'Brien		120.00		
Hourly rate for Sebastian	145.00			
Reimbursable expenses	Included in fee	11,391.00	At cost - No mark up	
Reimbursable expenses - travel		Cost plus 10%		NTE total cost of 11,391
Worked with FCI before		\$ 200m		
Current budget (BCMI)				Based on \$ 85/hr.
Total Hours				1176
Total budget				100,000

*Aspen Fire*

Nikki Lapin &lt;nikki.lapin@aspenfire.com&gt;

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**FW: AFPD N40, Owners Rep**

1 message

**Paul Broome** <broomebcmi@gmail.com>

Tue, Mar 30, 2021 at 9:19 AM

To: Nikki Lapin &lt;nikki.lapin@aspenfire.com&gt;, Rick Balentine &lt;rick.balentine@aspenfire.com&gt;

Nikki, please provide this email to the Board for options I can provide as Owners Rep.

Plus attached is a comparison for the Candidates.

Let me know if you have any questions

**From:** Paul Broome <broomebcmi@gmail.com>**Sent:** Saturday, March 27, 2021 9:07 AM**To:** 'Rick Balentine' <Rick.balentine@aspenfire.com>**Cc:** John.Ward@anbbank.com**Subject:** RE: AFPD N40, Owners Rep

Sorry, I forgot the attachments

**From:** Paul Broome <broomebcmi@gmail.com>**Sent:** Saturday, March 27, 2021 8:15 AM**To:** 'Rick Balentine' <Rick.balentine@aspenfire.com>**Cc:** John.Ward@anbbank.com**Subject:** AFPD N40, Owners Rep

Morning, after talking with you and John yesterday I wanted to be clear what I can and cannot do as Owners Rep moving forward for the N40 housing project.

We received 3 proposals for Owners Rep's that have been forwarded to you along with a comparison sheet and a list of questions that may want to be asked. (All attached for your reference) I believe any of the three Candidates would be a good choice for the AFPD. Please let me know if you want me to send these questions out to the Candidates so they can respond prior to your Tuesday's Board meeting.

There are a few options I can provide moving forward:

1. Help select a replacement Owners Rep and overlap with them as needed to get there Team up to speed on the project. I would be available most anytime after that remotely to help as needed with questions etc.
2. Delay selecting an Owners Rep until the project has started the foundation system. This will save some money and allow you to look at all options.

3. I can continue to act as Owners Rep "Remotely" but will not be available every hour of everyday. Things I can do:
  - a. Review & comment on monthly draws from the Construction Team and the Design Team. This would be done in the same format that I have been doing to date.
  - b. Update the overall budget monthly to the Board. I may not be able to attend your monthly Board meetings but would have the information available for your review.
  - c. Review & comment on any change orders from the Construction Team or the Design Team.
  - d. Monitor the construction budget and schedule with FCI.
  - e. Review means & methods used by FCI during construction.
4. My timeline
  - a. Last Official day full-time for me would be April 22, 2021
  - b. Going on the road (With a camper) to Florida to see family April 23, to June 1<sup>st</sup>, I should have cell phone reception most of the time and Wi-Fi in many areas we are staying.
  - c. June 1<sup>st</sup> to July 21<sup>st</sup> back in Colorado. In our camper, we are going to "Sleep around" in different areas (Granby, Steamboat and the Roaring Fork Valley) to possible find a piece of property or a home. I should have cell phone reception in many areas and Wi-Fi a few times a week. During this time I could make monthly site visits to review progress.
  - d. July 21<sup>st</sup> to September 1<sup>st</sup> back on the road to Wisconsin to see family. I should have cell phone reception most of the time and Wi-Fi in many areas we are staying.
  - e. September 1<sup>st</sup> back in Colorado to focus on finding a place to live. (buy or rent) During this time I could make monthly site visits to review progress. Our first choice would be in the Roaring Fork valley if the market clams down a bit. If we end up in the Roaring Fork Valley I could be available as needed (For the most part) throughout the balance of the project. We do plan on staying in Colorado no matter where we end up living.
5. Project timeline
  - a. Foundation starts around June 1<sup>st</sup>
  - b. Plaza deck around the end of September
  - c. Dry-in of buildings end of December through March 2022
  - d. Substantial completion April through May 2022
  - e. CO End of June 2022
6. Another option is no Owners Rep at all. Hire a Firm that reviews pay apps and does monthly site visits. FCI did comment that on many of their jobs they do not have an Owners Rep due to their style of doing an "Open book approach" on projects. I do believe FCI is upfront & fair and will build a quality project for you no matter what.

I do apologize for putting the AFPD in this position. With the delays of the project starting and all that's happened in our personal lives last year, the timing seems right to semi-retire/retire.

Thanks for your continuing support.

Please let me know your thoughts, I will assume we are still on for your Board meeting Tuesday at noon unless you tell me otherwise.

Thanks for your continuing support.

Please note, I have only sent this to the two of you. Please forward as you see fit.

Paul Broome

Broome Construction Management, Inc.

970 274 0928

broomebcmi@gmail.com

## Subject: AFPD N40, RFP responses to questions



**Paul Broome** <broomebcmi@gmail.com>  
to Rick Balentine

You are viewing an attached message. Aspen Fire Protection District Mail can't verify the auth

### Don Carpenter – Project Resource Company

1. What limits of general liability do you carry? **\$1m per occurrence and \$2m general aggregate**
2. What limits of professional liability do you carry? **\$1m**
3. Who will be the primary contact person for this project and where does he/she live? **Justin Hanna. Justin liv**
4. Describe the process you use to review a GMP pay application? **If the GC is amenable to a pencil copy rev the process. Whether or not that's possible, the review includes; 1) review of the G702 for accuracy with re values and verification against actual progress on site, 3) review of every invoice included in the pay applic pay application), 4) review conditional and unconditional lien waiver assembly is accurate per the construct of any other specific items that the construction contract may require (each contract can be somewhat diffe**
5. How often do you believe you should be on site? **On site presence varies during the specific project phase**
6. Are you willing to work hourly with a NTE? **Yes – assuming this refers to a monthly NTE.**
7. Does your firm bill travel time and travel expenses? **Only for travel outside of the Roaring Fork Valley, if or :**
8. List what if any items are considered additional billable expenses? **We manage costs for our clients and ex time allocation requirements, the only additional billable services we would expect will be reimbursables for**
9. List what if any items are considered additional billable services?
10. What other projects does your Firm have going on at the same time? **We currently have 4 open projects; 1, building SF home project in Pitkin County under construction and wrapping up fall 2022 and 4) 2 building S**
11. What other projects does your primary contact person have going on at the same time? **None at present. T**
12. When is your Firm available to get involved with this project? **Immediately.**

### Colleen Kaneda – Dynamic

1. What limits of general liability do you carry?

**DPM carries 1M for each occurrence/2M aggregate in GL Insurance. 1M in Auto and 1M/1M in Umbrella.**

2. What limits of professional liability do you carry?

**DPM carries 1M for each occurrence/1M aggregate in Professional Liability.**

3. Who will be the primary contact person for this project and where does he/she live?

**Chris Penney will be the primary contact person and he resides in Edwards, CO. Chris has another proje**

**Colleen Kaneda, who lives in Eagle, CO and Reilly O'Brien, who lives in Glenwood Springs, CO, will also**

# PROJECT RESOURCE

**PROJECT RESOURCE COMPANY LLC** is an ideal resource for owners in need of management for a variety of project types, including single family home construction, remodels, tenant improvements, capital improvement projects, horizontal construction and commercial/mixed use projects. PRC's members have an extensive construction and development background rooted in commercial, mixed-use and single-family home construction and development. We offer a broad set of core competencies in real estate development and construction management well-suited for any type project.

## SERVICE OFFERING

### Program Development Phase

- Entitlement oversight
- Project scope development
- Budget development and cost estimate oversight
- Project schedule development
- Assistance with design team assembly

### Design Development Phase

- Management of planning and design teams, with an emphasis on project schedule targets
- Management of preconstruction estimating process
- Value engineering oversight

### Procurement Phase

- Preparation of RFP
- Bid analysis & recommendations
- Interview proposed construction team
- Management of the general contracting process, including preparation of construction agreement.
- Permitting oversight and management

### Construction Phase

- Coordination of project team members
- Monitor quality of construction
- Monitor adherence to the construction schedule
- Monitor construction administration process
- Manage monthly payment requisition process
- Review change order proposals and negotiate on Owner's behalf
- Financial reporting, including cash flow projections

### Construction Closeout Phase

- Advocate for owner in receipt of the certificate of occupancy
- Assist with punchlist development
- Ensure placement of warranty program
- Ensure transmittal of important closeout documents



# PROJECT RESOURCE

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March 19, 2021

Aspen Fire Protection District  
c/o Paul Broome  
420 E. Hopkins  
Aspen, CO 81611

**Re: RFP for The Fire Place  
Owner's Representative Services**

Dear Mr. Broome:

Thank you very much for the opportunity to provide this proposal for Owner's Representative Services for the Aspen Fire District Housing project at the North 40. We respectfully submit the following:

## **Understanding of Project**

The Aspen Fire Protection District's project, The Fire Place, consists of 15 dwelling units in 4 buildings alongside various site improvements constructed on top of an 18,300 sf underground garage. AFPD will maintain whole ownership of the project for the primary purpose of renting dwelling units to qualified AFPD employees. Ongoing management of the facility has not yet been determined.

Construction Documents titled "Contract Set" and dated 1/15/21 have been issued by the project's architect, Stryker Brown, in coordination with their engineering and other design consultants. Design development and design team assembly are both complete.

APFD has executed a \$14.2M GMP construction contract with the project's general contractor, FCI Constructors. Sub-contractor buy out is just underway. A value engineering exercise is currently underway and expected to continue as long as may be appropriate for cost management and control.

Work on the 1.42 acre lot has already commenced under an access permit and the primary permit is anticipated to be issued during the week of March 15<sup>th</sup>. Once FCI mobilizes to the site under the primary permit, the work duration is scheduled for 16 months.

## **Basic Services**

For the project listed above, we propose the following scope:

- Work with AFPD, contractor, architect, other design consultants and miscellaneous team members to manage and maintain budgetary and schedule goals for the project.



# PROJECT RESOURCE

- Review any/all additional service requests made by architect or other design consultants and advise AFPD on recommended action.
- Work with AFPD to contract with any miscellaneous team members as may be necessary to complete the project.
- Attend the site on a regular basis to observe the progress and quality of the work, including attendance of weekly construction (OAC) meetings on site or virtual as appropriate.
- Provide oversight of the contractor's value engineering process, including engagement with sub-contractors as project buy out continues.
- Provide oversight of the contractor's buy out process, providing input as appropriate.
- Review all contractor requests for information and architect's or engineer's actions, keeping AFPD updated as needed.
- Review all monthly applications for payment by the contractor, in consultation with the architect or other design consultants as needed. Monitor all GMP allowances in conjunction with the pay application review, keeping AFPD updated on cost status.
- Prepare monthly draw packages for AFPD, including payment summaries and budget tracking/control for the project's full development budget; hard and soft costs. Maintain the project's development budget alongside the monthly draw.
- Review contractor's change order requests and any/all claims for extensions of time and advise AFPD on recommended action.
- Attend monthly meetings to update the AFPD board on the status of budget, schedule, owner decisions (made or to be made) and any other issues needing to be discussed.
- Oversight of project commissioning, if included in the budget or otherwise requested by AFPD.
- Create a final punch list in coordination with the design team and follow through completion to AFPD satisfaction.
- Assist AFPD in solicitation of an operator to manage and maintain the project at completion, including assistance with development of operating budgets as needed.
- Review and advise AFPD with respect to all warranties and all other documents required to be provided by the contractor in connection with final completion, final payment, and release of retainages.
- Work with contractor to formalize contractor's warranty protocols for the completed project and advise AFPD regarding same.
- Generally assist AFPD in the performance of their duties under the terms of the agreements with the architect, contractor and others rendering services or materials to the project.





# PROJECT RESOURCE

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## ***Specific Exclusions***

- Accounting, other than financial scopes specifically included above.
- Facility management or operational requirements of completed projects, including management of contractor's warranty program.
- Assistance in legal disputes having to do with the project.

## **Management Structure**

Staffing for the project will involve one primary Development Manager performing the day-to-day Basic Services, alongside regular and consistent Principal oversight and involvement. All PRC members will maintain general familiarity with the project in order to leverage each member's experiential skill set.

- Development Managers; Richard Kihnley, Justin Hanna
- Principal; Don Carpenter

## **Fee Structure**

**Basic Services** for the project will be billed as follows:

### ***Fixed Monthly Fee***

Basic Services are estimated at an average 12.5 hours per week (a range of 10-15 hours per week) through the duration of the project, ending at the issuance of a Certificate of Occupancy. Based on this anticipated average, we propose a **fixed monthly fee of \$9,200**. This number of hours is an assumed average over the full course of the project. The assumed average may be less than or greater than the actual number of hours spent during any given week. If additional hours are required to meet the needs of the project during any particular month, no additional amount will be invoiced.

Work for portions of months will be prorated across that month's working days.

Work beyond the issuance of a Certificate of Occupancy will be billed hourly, where the fee will not exceed the fixed monthly fee amount of \$9,200 per month.

Assuming a 16-month duration and one month of work beyond Certificate of Occupancy at a 50% allocation, we estimate a total fee for the project of \$151,800.

### ***Additional Services – Billable in addition to Fixed Fee, Hourly or as Negotiated***

Work items that are not included as part of the Basic Services, but are requested in writing, will be performed hourly unless a negotiated lump sum amount is preferred. The hourly rate for Don Carpenter is \$190, and for Richard Kihnley, Justin Hanna or other Development Managers is \$170.





# PROJECT RESOURCE

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***Reimbursable Expenses – Billable in addition to Fixed Fee, Pass Through with No Mark Up***

Out-of-pocket expenses incurred in performance of the Basic Services will be passed through with no mark up. Such reimbursable expenses include, reproductions, shipping and postage, travel outside of the Roaring Fork Valley, lodging and business meals, if applicable.

Thank you very much for the opportunity to submit this proposal. We are eager to be a part of your development team and look forward to hearing from you.

Sincerely,



Don Carpenter  
Principal  
Project Resource Company

P.O. Box 1480  
Carbondale, CO 81623



**DON CARPENTER**  
Post Office Box 1480, Carbondale, Colorado 81623  
970.948.9905 (m)

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- **20+ YEARS OF EXPERIENCE IN REAL ESTATE DEVELOPMENT FOR ASSETS TOTALING MORE THAN \$1B.**
- **FOCUS IN ALL PHASES OF THE DEVELOPMENT CYCLE, INCLUDING ACQUISITION, PLANNING, FINANCIAL MODELING, PROGRAM AND DESIGN DEVELOPMENT, CONSTRUCTION MANAGEMENT, SALES AND MARKETING AND DISPOSITION**
- **TEAM BUILDER AND PROBLEM SOLVER WITH EXCELLENT COMMUNICATION SKILLS**

<b>2009 - Present</b>	<b>PROJECT RESOURCE COMPANY, LLC – CARBONDALE, COLORADO</b> <b>PRINCIPAL</b>
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Principal and managing member of a real estate development consultant firm overseeing a variety of project types including single family homes, remodels, tenant improvements, horizontal construction and commercial/mixed use projects.

**PROJECT PORTFOLIO** – provided consultation services to clients on more than 15 major development projects, ranging in development costs of 250k to \$50m.

- **Red Butte Ranch – Pitkin County, Colorado:** a neighborhood of 3 single family homes ranging from 5,750 sf to 8,250 sf on the former Stein Ranch along McLain Flats.
  - **1762 Red Mountain Rd – Pitkin County, Colorado:** 8,500 sf single family home on Aspen’s Red Mountain.
  - **Maroon Creek Club – Aspen, Colorado:** pool/exterior hardscape and lounge remodel for a recreational facility in Aspen.
  - **12 Salvation Circle – Pitkin County, Colorado:** 8,250 sf single family home speculative project on Aspen’s Red Mountain.
  - **520 E. Hyman Avenue – Aspen, Colorado:** 3,000 sf condominium remodel in a mixed use building in downtown Aspen.
  - **287 Starwood – Pitkin County, Colorado:** 8,500 sf single family home in the Starwood neighborhood.
  - **Roaring Fork Club – Basalt, Colorado:** 52,000 sf of residential development in 13 buildings including infrastructure on an 18 acre site.
  - **Starwood Fire Station – Pitkin County, Colorado:** 4,500 sf substation for the Aspen Fire Protection District in the Starwood neighborhood.
  - **Victorian Square – Aspen, Colorado:** 13,000 gsf mixed use building in downtown Aspen.
  - **360 Lake Avenue – Aspen, Colorado:** 20,000 sf residential project encompassing two buildings in Aspen’s west end.
  - **17 Ute Place – Aspen, Colorado:** 10,000 sf single family home in Aspen’s east end.
  - **206 Lake Avenue – Aspen, Colorado:** 8,500 sf single family home remodel in Aspen’s west end.
  - **Aspen Core, Hyman Ave. and Hunter St. – Aspen, Colorado:** 37,000 sf mixed use project in downtown Aspen.
  - **625 E. Hyman Ave – Aspen, Colorado:** 21,000 sf mixed use project in downtown Aspen.
  - **508 E. Cooper Street – Aspen, Colorado:** 12,000 sf infill, mixed use project in downtown Aspen.
  - **Park Avenue Remodel – Aspen, Colorado:** 2,400 sf duplex remodel.
  - **Snowmass Base Village Welcome Center – Snowmass Village, Colorado:** Project Manager for Ridge Runner Construction for the Snowmass Base Village Welcome Center.
  - **Sinclair Meadows – Snowmass Village, Colorado:** Sinclair Meadows Affordable Housing project, a 21 unit townhome neighborhood.
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2006-2009	<b>STEEPLECHASE DEVELOPMENT PARTNERS, LLC – ASPEN, COLORADO</b> PROJECT MANAGER
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**Obermeyer Place – Aspen, Colorado**

Team member in the development management role for an \$80m, 225,000 sf mixed use neighborhood in Aspen, Colorado consisting of 22 luxury free market residences, 22 deed restricted residences, 40,000 sf of new commercial and 2 levels of underground parking.

**Residences at The Little Nell – Aspen, Colorado**

Team member in the project management role for a \$220m, 215,000 sf five star residence club, consisting of 26 fractional luxury units, 8 hotel rooms, 8 deed restricted residences, 7,000 sf of commercial and 2 levels of underground parking.

2004-2006	<b>AIG GLOBAL REAL ESTATE INVESTMENT CORP. – STOWE, VERMONT</b> CONSTRUCTION MANAGER
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**Master-Planned Community – Spruce Peak at Stowe**

Project team member on a \$350m master-planned resort development comprised of 438 development units, including 20 homesites, 38 duplex townhomes, 150,000 sf base lodge, 350,000 sf hotel, five 50,000 sf condominium buildings and an 18 hole golf course.

**Mountain Cabins** - \$21m lump sum construction contracts for the construction of twenty 3,000 sf luxury townhomes priced from \$1.5m to \$2.6m each, including the supporting horizontal infrastructure.

2000-2004	<b>HINES RESORTS– ASPEN, COLORADO AND CARBONDALE, COLORADO</b> ASSISTANT CONSTRUCTION MANAGER
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**Master-Planned Community – River Valley Ranch**

Project team member on a 600 acre master-planned community consisting of an 18 hole golf course, 550 custom homesites, single-family homes priced from \$400k to \$1.95m, townhomes and a community recreational center.

**Horizontal Infrastructure, Phases 7/8** - \$1.8m GMP construction contract for the construction of infrastructure supporting 97 custom homesites.

**Master-Planned Community – Aspen Highlands Village**

Project team member on 83 acre, \$260m mixed-use resort comprised of commercial space, 31 homesites, 31 luxury townhomes, 73 Ritz-Carlton Club condominiums, affordable housing, skier and visitor services and public transportation facilities at base of ski resort.

**Maroon Townhomes** - \$23m GMP construction contract for 6,000 sf luxury townhomes priced between \$3.25m and \$6.25m.

**Cloud Nine and Wille Residence Neighborhoods** - Assisted in the overall construction management of 36 affordable housing residences. The Cloud Nine neighborhood consists of 23 single-family residences built via a \$7.0m GMP construction contract. The Wille Residence neighborhood consists of 13 townhome residences built via a \$3.5m lump sum construction contract.

1992-1996	<b>EDUCATION</b> <b>UNIVERSITY OF MISSOURI – Kansas City</b> BACHELOR OF SCIENCE, Magna Cum Laude; Molecular, Cellular and Developmental Biology
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**RICHARD P. KIHNLEY II**  
321 Cleveland Place  
Carbondale, CO 81623  
970.930.5099  
richard@projectresourceco.com

**CAREER SUMMARY**

Comprehensive background in construction management. Developed by constantly attending to details, and providing the best possible product and service.

**EDUCATION**

Virginia Western College  
Roanoke, Virginia  
Business Management/Marketing

**PROFESSIONAL EXPERIENCE**

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**Development Manager, 2018 to Present**

Project Resource Company – Residential and Commercial

- Focusing on all phases of project development including Program Development, Design Development, RFQ/RFP and Construction Management. Also including budget management, information management and coordination, team member guidance and owner updates and communication. Complete service from planning to completion.

**Project Manager, October 2014 to 2018**

Key Elements Construction, General Contractor – Residential

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination, scheduling (MS Project), personnel management, invoicing and project completion/closeout. Project values – \$5m

**Operations Manager, November 2012 to October 2014**

Aspen Insulation / ColWest Roofing

- Responsible for all administrative functions, including payroll, accounts receivable / payable and requisite reporting, customer invoice and estimate preparation, construction document management and tracking, safety management, fleet management and human resource management.

**Project Manager, December 2010 to November 2012**

John Olson Builder Inc, General Contractor – Residential

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination, scheduling (MS Project), personnel management, invoicing and project completion/closeout. Project values – \$10m

**Project Manager, March 2008 to November 2009**

Fenton Construction, General Contractor – Residential

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination, scheduling (MS Project), personnel management, invoicing and project completion/closeout. Company Safety Director. Project values – \$6m to \$7m. 28,000 Sq Ft to 33,000 Sq Ft

**Project Manager, November 2005 to March 2008**

AutoBuilders General Contracting Services, Inc., General Contractor – Commercial

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination, scheduling (MS Project), personnel management, invoicing and project completion/closeout. Awarded company's 2003 Global Excellence Award for Customer Service. Company Safety Director. Project values from \$500k to \$4m. 8,000 Sq Ft to 34,000 Sq Ft

**Project Manager, November 2004 to November 2005**

Stiles Construction, General Contractor – Commercial

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination (Prolog proficient), scheduling (MS Project), personnel management, invoicing and project completion/closeout. Project values from \$4m to \$5m. 12,000 Sq Ft to 14,000 Sq Ft

**Project Manager, July 2001 to November 2004**

AutoBuilders General Contracting Services, Inc., General Contractor – Commercial

- Responsible for all phases of project management, including subcontractor buyout and coordination, permit/plan coordination, financial tracking and control, materials purchasing and coordination, scheduling (MS Project), personnel management, invoicing and project completion/closeout. Awarded company's 2003 Global Excellence Award for Customer Service. Project values from \$500k to \$3m. 5,000 Sq Ft to 24,000 Sq Ft

**RESIDENTIAL PROJECT LIST**

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**Country Club Pool and Lounge Remodel**

Construction Manager – Remodel of interior lounge area and replacement of outdoor pool, including addition of slide, associated civil work and added maintenance road through existing site.

**Custom Home – Aspen Colorado**

Development and Construction Manager – 8500 SF mountain modern home with 4 bedrooms, wellness center, gym and pool. Participated with design team coordination and planning, and with general contractor as construction manager.

**Aspen Fire Protection District**

**Employee Housing - Starwood Metropolitan District**

Construction Manager – Project Resource Company - 2 story residential with 2 employee housing units, attached to fire apparatus bays, including covered parking area and new underground utilities. Worked in concert with Starwood HOA and AFD staff to meet the operational needs of both parties.

**Custom Home Development – Basalt Colorado**

Construction Manager – Project Resource Company - 13 new cabins for newly developed section of golf club. Specifically working on owner customizations including coordination with club ownership, general contractor and design teams.

**Custom Home – Aspen Colorado**

Project Manager – Key Elements Construction - 4000 Sf mountain modern home with 4 bedrooms and 5 baths. Home sits on a steep site and includes extensive wood and stone elements.

**Condo Remodel – Aspen Colorado**

Project Manager – Key Elements Construction - 1800 SF modern remodel. Condo was complete gutted, with upper floor roof partially removed and replaced to add vaulted ceiling in master bedroom.

**Custom Home – Aspen Colorado**

Project Manager – Key Elements Construction - 5000 SF modern home with 4 bedroom, six baths. Home has large cantilevered elevated deck and sits on a site retained by a 20' tall MSE wall. Home systems include in floor hydronic heating with supplemental forced air heat, all house AC and extensive automated audio visual, lighting and shading.

**Custom Home – Carbondale Colorado**

Project Manager – Key Elements Construction - 3600 SF mountain modern home with 4 bedrooms and 5 baths. Project included separate garage, and separate purpose-built woodworking shop building. All buildings have extensive exterior stone work.

**Custom Home – Carbondale Colorado**

Project Manager – Key Elements Construction - 2800 SF rustic home with 3 bedrooms and 4 baths. Home was built on a fill site and required extensive fill and site work. Unique exterior feature – rear patio constructed on hand built stone retention wall, overlooking adjacent river.

**Custom Home – Star Mesa, Aspen Colorado**

Project Manager – John Olson Builder - 15,000 SF home with 8 bedrooms, 9 baths, commercial kitchen and extensive exterior building features. Original home was demolished, leaving only a section of basement and foundation. New foundation was then added to achieve additional square footage. Home systems include Geothermal heating and cooling, elaborate custom cabinetry and extensive automated audio visual, shading and lighting.

**Multi Family – Snowmass Village Colorado**

Project Manager – Fenton Construction - Approx. 36,000 Sf of multi-family housing units. Consisting of buildings, 2 vehicle carports, building and site utilities and landscaping.

**COMMERCIAL PROJECT LIST (SPECIFICS AVAILABLE UPON REQUEST)**

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**Numerous Auto Dealerships – New and Remodel, South Florida (Palm Beach, Broward and Dade Counties)**

Project Manager – Autobuilders General Contracting Services - To include: showroom and service buildings, and associated facilities; large parking lots with substantial civil construction and multi-level parking garages.

# JUSTIN T. HANNA

(202) 909-5195 | 520 Mesa Drive, x4323 Eagle, CO 81631 | [jthanna1@gmail.com](mailto:jthanna1@gmail.com)

## CONSTRUCTION MANAGER

Real Estate Development / Real Estate Finance / Real Estate Asset Management Analysis

In-depth understanding of real estate development and construction, including financing, leasing, entitlements, asset improvement strategies, and design and construction phases. MSRE 2016.

- Passion for real estate development and construction management with strong financial and analytical skills and solid knowledge of real estate finance and investment, strategic development and implementation, and regulatory issues.
- 15 years of progressive experience in the planning, design, development, and construction of diverse, complex, and high-profile projects for new construction and development, major expansions, renovations, capital improvements of existing properties, and tenant improvement projects. Consistently achieved critical milestone dates and on-time completion of multiple projects within budget with pro forma costs up to \$150M.

### Core Competencies Include

Financial Models & Projections • Feasibility Studies • Cost Analysis • Construction Estimating • Budget Development • Project Initiation & Determination • Transaction Structuring • Zoning & Permitting • Regulatory & Funding Issues • Due Diligence • RFQ/RFP • Multi-Disciplinary Construction Team Management • Real Estate Development • Negotiations & Contract Administration • Risk Management • Client Relations

## Professional Experience

### Director of Engineering, VAIL (MTN), Vail, CO

2018-2020

Responsible for the hiring and assignment of VAIL Engineers and Facility Maintenance Managers. The Director of Engineering Position was also responsible for the design development, contract negotiations, municipal approvals of construction projects associated for VAIL Food and Beverage and VAIL Hotels and Hospitality.

- **Key Project:** The iconic Tombstone BBQ at Park City Resort, Park City, UT.

### Development and Construction PM, City of Aspen, Aspen, CO

2018-2018

*Historical municipality that serves 6,000 residents.*

Experienced as an employee of a government agency, hired as a Project Manager for the City of Aspen in the Asset Department. Scope of responsibilities included real estate acquisitions, civic and multi-family project design-funding procurement, and construction management of Aspen Pitkin County Housing Authority projects.

- **Asset Department Director and City Manager's Office:** supported with cost analysis, seller negotiations, and presentations to city council for a \$32 million-dollar real estate improvement
- **Public Private Partnership (PPP):** construction and design cost development and Value Engineering analysis of three multi-family improvements.
- **Civic Construction Projects:** development of funding profile and design documentation, permitting process, schedule development, and execution of various civic projects.

### Project Manager, RAND CONSTRUCTION CORPORATION, Alexandria, VA

2013 – 2015

*Award-winning national commercial contractor specializing in tenant interiors, building renovations, base building, retail, restaurant, and ground-up construction.*

Provided project support to executive project manager, ensuring all construction goals, developing O&M procedures, and tracking project documentation using Prolog. Scope of responsibility included preconstruction, submittals, RFIs, logs, scheduling, procurement, cost tracking, and project closeout through punchlist completion. Point of contact for owner representatives /construction managers, architects, and subcontractors. Supervised onsite contractor.

- **Handled 4-5 projects at any given time** with responsibility for procuring estimates and bids, managing change order approvals, and preparing/closing contracts. Co-managed budgets of \$2-\$10M per project. Selected projects:
  - **Haynes & Boone law firm:** 1-story build-out project in D.C.'s PNC Place. Construction project achieved LEED Certification and WBC Craftsmanship Award for drywall finish and ornamental metals.



- **American University, Aramark contract:** 3,000 sq.-ft. build-out of Starbucks and P.O.D. Market on campus under tight schedule in an occupied setting. Scope included demolition and fit-out, custom millwork, and new MEP systems. Coordinated with client and brand, accommodating many changes.

### Senior Superintendent, TURNER CONSTRUCTION COMPANY, Washington, DC

2011 – 2013

*One of the largest construction management companies in the U.S. with \$10B in annual construction volume on 1,500 projects.*

Recruited to oversee interior fit-out construction for the Nuclear Regulatory Commission (NRC) fast-track contract of \$45M in final construction cost. Completed OSHA 30-hour training. Reported directly to executive project manager.

- **Responsible for preconstruction/construction phases**, team selection, hard/soft cost estimating, project planning, owner/tenant representation, on-site/off-site progress, work quality, and co-management of budget.
  - **New Data Center and Sensitive Compartmented Information Facility (SCIF) for NRC with LCOR Development:** Oversaw construction of new data center and SCIF space, including building-wide voice, data, and AV installation, as part of the LEED Silver certified, 660,000-sq.-ft., Class A office building and tenant fit-out with 14 office levels, housing 1,300 employees.
- **In charge of project commissioning for all systems and components**, including testing, installation, and integration of HVAC, communications equipment, and security software/systems.
- **Managed inspection and permitting process**, procuring building permits and certificates of occupancy from the Department of Consumer and Regulatory Affairs in D.C.

### Senior Superintendent, STRUCTURE TONE INC., New York, NY & Washington, DC

2005 – 2011

*Among the top 20 construction companies worldwide with \$3.5B in annual construction volume; offices in the US, UK, and Ireland.*

Promoted rapidly from assistant to senior superintendent. Oversaw all aspects of construction phases for large, high-profile interior fit-out contracts in the greater D.C. and NYC metropolitan areas. Ensured on-time/budget execution of fast-track and major projects. Scope included procurement, onsite design coordination, OSHA standards, permitting, construction/quality inspections, bids, budgeting/costing, scheduling, logistics, and team selection.

**Supervised new building and major expansion/addition construction**, coordinating ~30 onsite contractors and superintendents with full accountability for safety and field operations in client-facing role. Selected projects:

### Project Manager / Superintendent / Field Engineer

JOHN &amp; ASSOC., Boston, MA

2001 – 2005

*Leading, privately owned construction management firm with an extensive roster of Fortune 500 clients.*

Hired as field engineer on the Charles Stark Draper Laboratory build-out, designed by leading architecture firm Tsoi/Kobus & Associates. Promoted in 6 months to assistant superintendent, then assistant project manager. Supported execution of fast-track build-out contracts. Conducted cost estimates and takeoffs, project purchasing, Guaranteed Maximum Price (GMP) proposals, and contract bids/awards. Developed and executed field logistics and construction management. Assisted in municipal permitting and inspection procedures for construction process.

## Education | Professional Development

### MASTER OF SCIENCE IN REAL ESTATE (MSRE) 2016

AMERICAN UNIVERSITY, KOGOD SCHOOL OF BUSINESS, Completion Fall 2016

The Marvin Dekelboum Scholarship Recipient, Spring 2015

- **Commercial Real Estate Development Association (NAIOP) Challenge:** Prepared comprehensive development proposal for a pre-selected D.C. location. Conducted intensive research and preparation. Presented case before panel of local real estate veterans and audience of 250+ in team effort.
- **ARGUS Software Challenge:** Created real-world investment strategies, including financial models, pro forma valuation, and case study paper, through informed decisions using ARGUS Enterprise in team effort.
- **Altus Group, University Portfolio Challenge:** Theoretically allocated \$1B in capital to real estate investment choices directly linked to well-known industry indexes. Investment performance still in progress. Team effort.

### ST. LAWRENCE UNIVERSITY, BACHELOR OF ARTS (BA) IN ENVIRONMENTAL STUDIES

Environmental Law and Studies BS / Canton, NY, 1997-2001

NORTHEASTERN: Construction Management & Construction Scheduling • OSHA 30-Hour Training  
Microsoft Office (Certified in PowerPoint, Expert in Excel) • Prolog Construction Project Management Software

# PROJECT RESOURCE

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## PROJECT EXPERIENCE

PRC has been consulting on development projects in the Roaring Fork Valley for 11 years. Collectively, however, PRC's members have 50+ years of experience in the construction and development industry including several master-planned development projects, complicated mixed-use infill buildings, commercial tenant finishes and intricate single-family homes. Highlights of current and past PRC projects are summarized below:



### **Private Residences, McClain Flats, Pitkin County, Colorado**

- PRC as Development Manager for two single-family homes in Pitkin County.
- Combined, the two buildings total approximately 18,000 sq. ft.
- Scheduled for Completion Spring, 2022.



### **Private Residence, Red Mountain, Pitkin County, Colorado**

- PRC as Development Manager for a single-family home on Aspen's Red Mountain.
- Approximately 8,500 sq. ft.
- Scheduled for Completion Spring, 2023.



### **Private Residence, West End, Aspen, Colorado**

- PRC as Development Manager for a single-family home in Aspen's historic West end.
- Approximately 20,000 sq. ft. in two buildings.
- Scheduled for Completion Summer, TBD.



### **Pool and Interior Remodel, Maroon Creek Club, Aspen, Colorado**

- PRC as Development Manager for an interior and exterior remodel of the Maroon Creek Club.
- Consists of a 1,000 sq. ft. remodel of the pool atrium and new pool, hardscape and softscape.
- Scheduled for Completion Summer, 2022.

# PROJECT RESOURCE



## 12 Salvation Circle, Pitkin County, Colorado

- PRC as Development Manager for a speculative single-family home on Aspen's Red Mountain.
- Approximately 8,500 sq. ft.
- Completed Winter, 2021



## 520 E. Hyman Ave, Aspen, Colorado

- PRC as Development Manager for an extensive condominium remodel in downtown Aspen.
- Approximately 3,000 sq. ft.
- Completed Fall, 2020



## 287 Starwood, Pitkin County, Colorado

- PRC as Development Manager for a single-family home in the Starwood neighborhood.
- Approximately 8,500 sq. ft.
- Completed Fall, 2020



## Roaring Fork Club, Cabins 52-64, Basalt, Colorado

- PRC as Construction Manager for a 13-cabin expansion on the existing Roaring Fork Club Campus.
- Approximately 52,000 sq. ft. + 18 acres of infrastructure.



## Starwood Fire Station, Starwood Neighborhood, Pitkin County, Colorado

- PRC as Development Manager for a Fire District Substation in the Starwood neighborhood.
- Approximately 4,500 sq. ft., containing two fire district apartments.
- Completed Winter, 2019.



## Victorian Square, 601 E. Hyman Avenue, Aspen, Colorado

- PRC as Owner's Representative for Victorian Square LLC.
- 13,500 sq.ft. mixed use building in the downtown core of Aspen, including one residential penthouse unit at 2,000 sq.ft and 7,000 sq. ft. of leasable commercial area.
- Completed Summer, 2017.

# PROJECT RESOURCE

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## **Private Residence, Aspen, Colorado**

- PRC as Development Manager for a single-family home in the East End of Aspen.
- Approximately 10,000 sq. ft.
- Completed Summer, 2016.



## **Aspen Core, E. Hyman Avenue, Aspen, Colorado**

- PRC as Development Manager for Aspen Core Ventures, LLC.
- 37,000 sq.ft. mixed use building in the downtown core of Aspen, including two residential penthouse units at 6,950 sq.ft. and 2,000 sq.ft., and approximately 22,000 sf of leasable commercial area.
- Completed Winter, 2015.



## **625 East Hyman Avenue, Aspen, Colorado**

- PRC as Development Manager for 633 Spring II, LLC.
- 22,000 sq.ft. mixed use building in downtown Aspen, including one 3,500 sq.ft. residence and three commercial units ranging from 2,000 – 5,000 sq.ft.
- Completed Spring 2014.



## **206 Lake Avenue, Aspen, Colorado**

- PRC as Development Manager for the homeowner.
- Remodel of an existing 6,000 sf historic residence in Aspen's west end, and the addition of an approximate 2,500 sf basement.
- Completed Fall, 2015.



## **508 East Cooper Avenue, Aspen, Colorado**

- PRC as Development Manager for Cooper Street Development, LLC.
- 11,000 sq.ft. mixed use building in the downtown core of Aspen, including one 4,500 sq.ft. residence and two approximately 1,800 sq.ft. commercial units.
- Completed Fall, 2012.

# PROJECT RESOURCE

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## MEMBERS

### **Don Carpenter**

Principal

(970) 948.9905

[don@projectresourceco.com](mailto:don@projectresourceco.com)

### **Richard Kihnley**

Development Manager

(970) 930.5099

[richard@projectresourceco.com](mailto:richard@projectresourceco.com)

## REFERENCES

1. **Andrew V. Hecht – Principal, Garfield & Hecht, Aspen, Colorado; 970.925.1936**  
Don Carpenter has completed 5 mixed use infill projects in downtown Aspen for Mr. Hecht's various partnerships.
2. **Natasha Saypol – Attorney, Formerly of Garfield & Hecht, Aspen, Colorado; 303.248.3753**  
Don Carpenter has worked with Ms. Saypol in her capacity as developer's attorney on each of the 4 infill projects in downtown Aspen. Ms. Saypol is no longer practicing law, but can be reached on the mobile number listed.
3. **Tom Todd – Partner, Holland & Hart, Aspen, Colorado; 970.925.3476**  
Don Carpenter worked with Mr. Todd on a master-planned infill project called Obermeyer Place while employed by a former developer, Steeplechase Partners.
4. **Dwayne Romero – President & CEO, Romero Group, Colorado. 970.618.8880**  
Don Carpenter worked as an employee of Mr. Romero's development firm, Steeplechase Development Partners. Don also worked with Mr. Romero with the developer Hines Resorts on the Aspen Highlands Village project.
5. **Stephen Kanipe –City of Aspen Chief Building Official, Aspen, Colorado. 970.274.2845**  
Don Carpenter has become acquainted with Mr. Kanipe during the course of all his projects constructed within Aspen city limits.





## Mission-Driven Culture

By Mark Smith & Don Whittemore

*A tsunami of fire closes in on a casino resort in the foothills east of San Diego. A CalFire Battalion Chief, scouting as a field observer along with a sheriff's deputy, arrives on scene to unfolding catastrophe: people are panicking and attempting to evacuate on a narrow, winding road. In the BC's judgment, the 2500 people around the casino will face certain death in their struggle to escape the flames. He orders everyone inside and directs management to lock the doors. When the flame front passes, the BC directs the deputy to go door to door and evacuate to as many homes as possible in the fire's path.*

Post-event investigations all agree that together the BC and sheriff's deputy saved thousands of lives that night. Their extraordinary actions were not the result of specific policies or standard operating procedures. They were the result of an organizational culture that fosters adaptability and resilience – a Mission-Driven Culture (MDC).

The Battalion Chief had no positional or delegated authority to take the actions he did, nonetheless, it was the necessary thing to do and it was the right thing to do. The Los Angeles Times agreed: *"In a night where few guesses proved right, [the battalion chief's] gamble paid off. Like a moat, the parking lot and golf course protected the casino as flames raged past."*

Contrast that story with this headline from an incident several years later that sparked community outrage:

### ***'Handcuffed by policy': Fire crews watch man die***

*About 75 beachgoers could not understand why [city] firefighters and police officers stood idly by and watched the man slowly succumb to the 60-degree water.*

*"It's horrible," [a witness] said. "How can we let that happen? How can our emergency personnel allow that to happen? I don't get it, I don't understand it."*

*The [city] Fire Department says budget constraints are preventing it from recertifying its firefighters in land-based water rescues. Without it, the city would be open to liability.*

*When asked by [the news] if he would enter the water to save a drowning child, [city] Fire Div. Chief [name] said: " Well, if I was off duty I would know what I would do, but I think you're asking me my on-duty response and I would have to stay within our policies and procedures because that's what's required by our department to do."*

In one situation, responders over-rode policy and saved thousands of lives. In the other, they followed policy and a 50-year old man spent nearly an hour in the chilly water before drowning in plain sight of those sworn to save him.

Followers are conditioned to follow rules. When they encounter ambiguity, they ask permission to act. Until then, they wait to be told what to do. Rules make sense for things that cannot be delegated or have no value being delegated. When they interfere with doing the right thing, that's a problem. Tragically, accounts of agencies shackled by their own policies are all too common. Initially well intended, these policies become "Tail Wags Dog" stories, counterproductive to the organization's mission.

How are we to equip people with the necessary guidance so the *right* action is taken, at the *right* time, and for the *right* reasons? The answer lies not in beefing up current policies, but in shifting culture to value *operators* over *followers*.

MDC consists of a set of foundational values and principles that integrate existing sets of values and practices throughout the organization and align them to the core purpose of the organization. MDC seeks to optimize the

## Mission-Driven Culture

By Mark Smith & Don Whittemore

balance of safety, efficiency, and effectiveness to best deliver service to the customer. It places priority on maximizing successful mission accomplishment over rote process.

Bureaucracies tend to rely on systems and processes to make decisions. MDC relies on individuals to use their judgment, guided by values and principles versus policies and rules. In standard circumstances, the best course will normally be to use the applicable standard operating procedure (SOP). Standard situations are where the inputs are well understood and the outputs (the results) are highly predictable. In abnormal circumstances, the SOP is inadequate to solve the problem and achieve success.

A Mission Driven Culture (MDC) has six core values:

- Service for the Common Good
- High Trust State
- Pursuit of Truth
- Form & Function Defined by the End State
- Individual Initiative
- Continuous Improvement

MDC uses a system of mission command - decentralized decision-making, guided by a framework of leader's intent combined with the authority and expectation to act. Senior leaders communicate the task, purpose and end state of an assignment and provide the needed resources. The *how* of getting it done – the planning and the execution - is delegated to sub leaders.

In the absence of guidance, operators are expected to act within the intent of the organization's mission. Operators should constantly strive to influence their environment to accomplish the mission. They act as leaders regardless of rank. The BC at the casino was an operator. By his telling, his decisions and actions were a product of a mission-driven culture.

Mission command is extraordinarily disciplined. Each operator is highly accountable for their actions and the flow of information. Senior leaders still communicate constraints – things that must be done or things that cannot be done – but MDC focuses on training people how to use their judgment, rather than rely solely on rules and policy.

Agencies are experiencing an explosion of complexity, and with that, increased expectations and accountability. Federal assistance is shrinking or at best, flat lined. These trends drive the need for greater adaptability, and increasing the speed of the decision cycle. The model of hierarchal, centralized command and control reflects an obsolete leadership paradigm that believes people are cogs and controllable by systems. This model fails in large, dynamic events. Information cannot flow 'up', be decided upon, and flow 'down' fast enough before the decision is rendered irrelevant by changing circumstance.

Paradoxically, centralization seems part of our nature. For the most part, emergency responders work in government agencies that tend to be bureaucracies. Bureaucracies seek equilibrium and self-preservation. The goal is expressed as control and is most frequently achieved by attempting to eliminate uncertainty and surprises. The absence of bad things becomes valued more than the presence of good things. The well-worn path to avoid bad things is to make lots of rules and centralize authority.

Inevitably layers on layers of policies and rules impact operational culture. They create a culture of permission asking followers. Originally intended to eliminate negative outcomes, myriad rules end up stifling initiative,



## Mission-Driven Culture

By Mark Smith & Don Whittemore

discretion and judgment. While waiting for permission, critical windows of opportunity are missed, and, as we read earlier, a man drowns to death.

This is the *Myth of Control*. The more one tries to reach down and grab control in chaos, the less control one actually has. That cultural model creates micromanagers and followers rather than leaders and operators.

The culture of permission asking also creates risk aversion. Followers are more afraid of breaking rules and making mistakes than of missing an opportunity to make a difference. Team failure is acceptable because of the cultural norm that individual failure, and not team failure, is what gets punished. Thus, the focus is not on success, but rather on avoiding failure.

Nearly 200 years ago, Carl von Clausewitz first used the term *Fog* in describing the effects of chaos on the battlefield. The phrase, *Fog of War* quickly became part of military science. He noted that the combination of friction, danger and uncertainty would stymie the efforts of a force to project its will on the operational environment. These elements are inherent in the DNA of chaos. An increase in one – uncertainty, for example – tends to start a snowball effect with the other two elements and quite often magnifies their cumulative effects unexpectedly.

We're at a point in society where the fire or the flood is no longer the primary issue. Second and third order effects that cascade into the strategic, human driven dimensions of incident management create new levels of complexity: Political, Security, Economic, Social, Infrastructure, Information. These dimensions greatly magnify expectations and demands for results. They add to the confusion and challenge inherent in the *fog*. Operators do not implement strategy, but in this environment one operator, at the right time and place – or the wrong time and place – can have strategic impact. Just contrast the two stories at the beginning for examples of both.

The *fog* guarantees that, by the time a request has reached higher authority, the situation has completely changed. The window of opportunity has closed. Mission Command doctrine urges "...the use of commander's intent and exercising disciplined initiative to seize, exploit and retain the initiative."

MDC and its intent based planning system is based on 3 foundational assumptions about an operating environment where the *fog of war* is common:

- Uncertainty - *Every decision made in real time is imperfect.*
- Friction - *Generally, the best decisions will be made by those closest to the event.*
- Danger - *A well trained operator, taking reasonable precautions, can still be injured or killed.*

Rules and standard operating procedures that work well in routine emergencies begin to break down quickly as the *fog* increases.

In MDC, many policies and rules are considered authoritative but flexible. Operators are expected to use disciplined initiative to adapt the rule to the situation. Operators are even expected to disobey literal orders when they understand the situation has changed where following those orders would prevent accomplishing mission intent.

MDC relies on professional judgment to reach the appropriate decision in chaotic circumstances. Decisions that result in bad outcomes, if made in good faith trying to meet the intent, are underwritten as acceptable losses and learning opportunities for the organization.

## Mission-Driven Culture

By Mark Smith & Don Whittemore

The *Myth of Control* leads to another logic flaw within operational culture – that systems govern people instead of the other way around. This leads to a compliance mindset. Compliance is necessary and effective in managing machines, material and money. It is counter-productive in managing human behavior. Bureaucracies tend to forget that bringing order to chaos is a creative and interactive social process between humans. This type of collaboration is not managed well by policies.

In a rules-based system, any failure results in one of two possible conclusions:

1. There was no rule, so now, we just need to make a new rule.
2. The existing rule did not work. We need a better rule. A stronger rule!

Over time, the density of policy documents results in many rules that contradict others. This guarantees an environment where people cannot do their jobs and comply with all the rules on the best day. Thus, on the worst day, as chaos and the *fog of war* increase, mission success is even more unachievable. When such failure is investigated and judged in hindsight against the agency's own rules, leaders often have no viable defense.

In contrast to a centralized, rules based leadership system, Mission-Driven Culture (MDC) relies on disciplined individual initiative and professional judgment in interpreting a set (or sets) of principles, and one of MDC's most powerful organizational effects is that while accountability goes up, liability goes down. Thus, external evaluation is left to determine whether the operator's judgment was within acceptable or reasonable limits by people with roughly the same level of training, qualifications and experience as the decision maker in question. Moreover, because fear of liability is reduced, leaders can use more peer reviews or Facilitated Learning Analysis Teams for minor failures and near misses, and real discipline is reserved for willfully violating policy or for gross negligence. All other issues can be dealt with through mentoring and training.

To be sure, operator accountability is paramount. They must trust their leadership and be trusted by leadership. Operators must be trained and extremely proficient in principles based critical thinking. Consider for a moment our story of the Fire Div Chief unwilling to save a drowning child if doing so meant violating department policies and procedures. It is doubtful that those rules were enacted specifically to hamper life-saving actions, but rather to limit some other action or behavior that produced an undesirable outcome. Thus, the intent behind the policy is lost and blind adherence to them results not only in individual failure, but ultimately organizational failure as well.

Organizational leaders who have adopted intent based planning approaches to address this gap in mission achievement, describe the following indicators of success:

1. Leaders at all levels are feeling like the quality of risk decisions and discussions has improved.
2. Leaders feel like the trust state has increased up and down the chain as well as with executive staff above the agency or incident management team.
3. Leaders feel like they are getting fewer "surprises" as managers.
4. Leaders feel like they are getting better "buy in" from cooperators and stakeholders.
5. Leaders feel like they are getting higher levels of support internally and externally.

Other critical organizational metrics manifest over time: a decrease in grievances, an increase in retention, and fewer lost days. In totality, the six mission driven culture values, which provide for initiative, trust, truth and improvement, provide for greater individual judgment and accountability. Operators are specifically delegated the opportunity to succeed and, in doing so, the organization is aligned for success as well.

## Mission-Driven Culture

By Mark Smith & Don Whittemore

What's surprising about the \$11B (USD) of federal funding provided post-9/11 to state and local response organizations for equipment and technical training is the fact that only .0058% of it has been spent on command or leader development. Another way to view this is we've likely spent more money for the helmet and gear that go on a responder's head, than what goes in it. Priorities have focused on acquiring "things" as opposed to developing skills such as decision-making, critical thinking and judgment during chaotic, complex events. The investment and commitment to the developing right culture is the necessary next step in the evolution of emergency services.

There is no denying the increased challenges responders face. Expectations are expanding; risk is escalating; societal networks are growing more complex and, consequently, more vulnerable. In this world, the centralized decision-making model is increasingly a recipe for failure.

MDC and its intent based principles and tools encourage and enable critical thinking, a common operating picture, concentric decision-making, and risk management at the operator level. MDC minimizes the friction, uncertainty and risk inherent in the *Fog of War* by increasing flexibility and adaptability. Using the context of leader's intent, operational decisions are accelerated to take advantage of opportunities for success in the field.

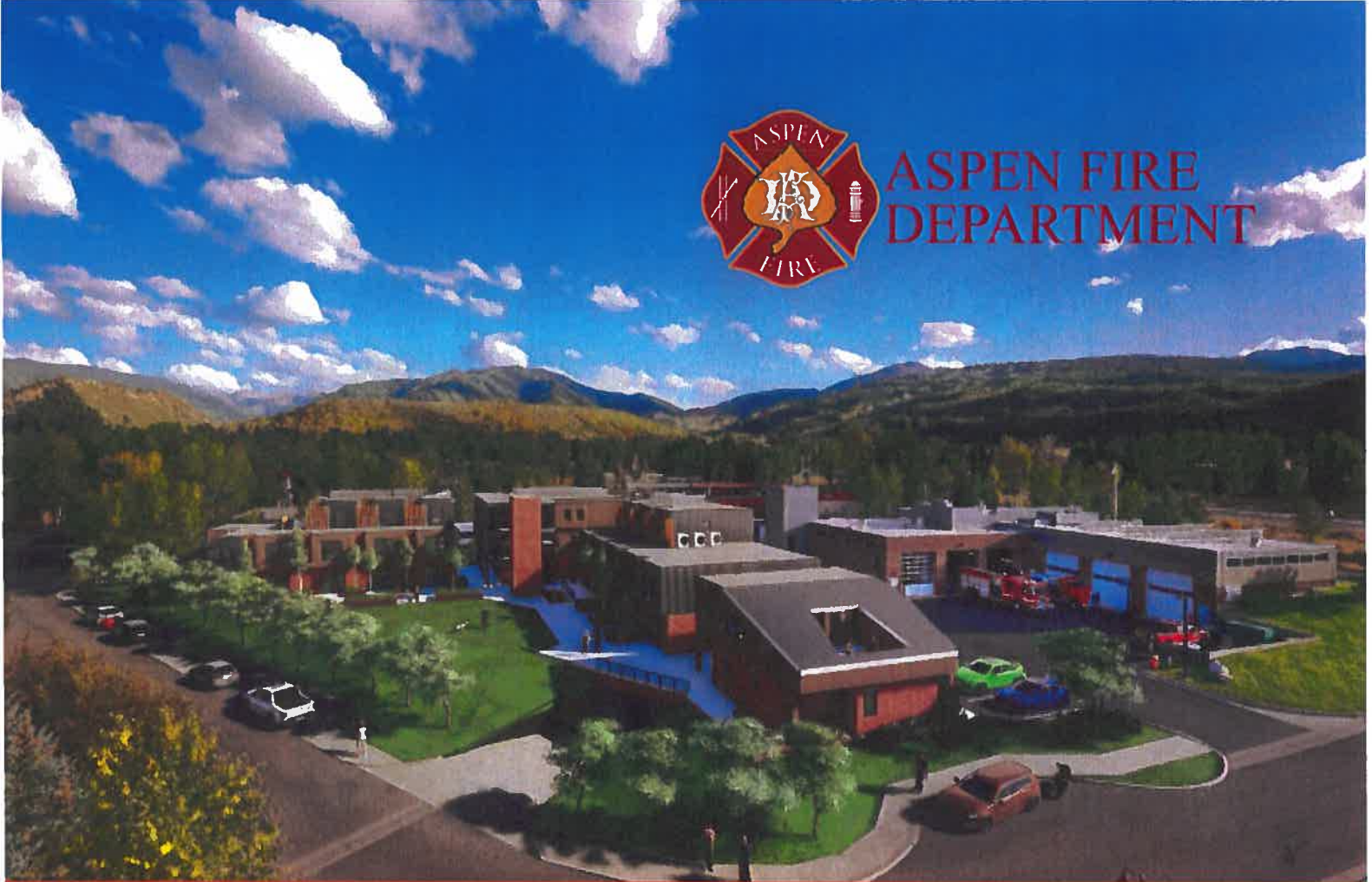
MDC is not like a fire extinguisher – *in case of emergency break glass* – that you can pull out and use only when a crisis hits. To be there when "it" hits the fan, it must be part of how business is done every day. In other words, *train as you fight*.

In the military, a *force multiplier* is a... "capability that, when added to and employed by a combat force, significantly increases the combat potential of that force and thus enhances the probability of successful mission accomplishment." Mission-Driven Culture is a force multiplier.

The call to action is for senior leaders of today's emergency response agencies to make the investment of time, energy and resources to build the culture that is adaptive and resilient to the ever-growing list of challenges. The outcome will be a higher level of customer service and mission accomplishment; increased trust within the community; and, leaders better prepared for future positions of increased responsibility as well as the large complex events they will undoubtedly encounter.



**ASPEN FIRE  
DEPARTMENT**



**DYNAMIC**

**PROGRAM MANAGEMENT**

PO BOX 726 | EAGLE, CO 81631

**OWNER'S REPRESENTATIVE SERVICES**

**NORTH FORTY HOUSING PROJECT – THE FIRE PLACE**

**ASPEN FIRE PROTECTION DISTRICT RFP**

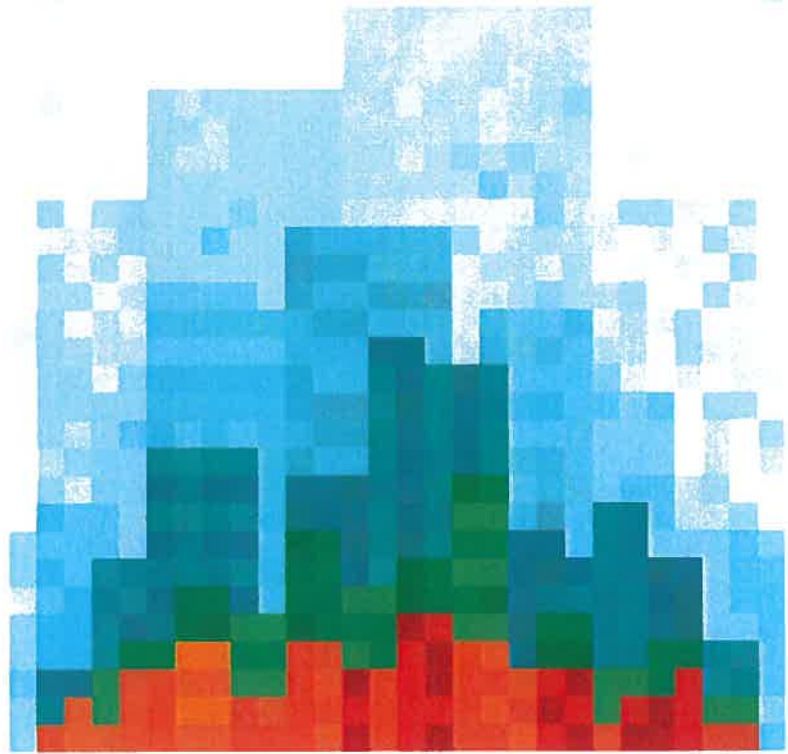
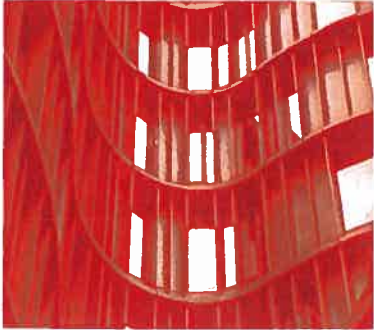
MARCH 24, 2021; 2:00PM MST





# DYNAMIC

## PROGRAM MANAGEMENT



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March 24, 2021

Ms. Nikki Lapin  
District Administrator  
Aspen Fire Protection District  
420 East Hopkins  
Aspen, Colorado 81611

Dear Ms. Lapin,

Thank you for your time in reviewing our qualifications and proposal to provide Owner's Representative services for your fire fighter housing project located at Station 62. We understand Aspen Fire Protection District ("AFPD") is seeking an experienced Owner's Representative that will oversee the Design and Construction Teams during the construction phase of the North Forty Housing project, also known as "The Fire Place". Having read your RFP in detail and reviewing the documents provided, we understand the project to comprise of:

- Four (two-story) wood framed structures to be built on top of an 18,244 SF underground parking structure
- Your project team members (Stryker Brown and FCI Constructors) are already in place with contracts executed and earthwork underway
- Construction is expected to take 16 months

**Dynamic Program Management (DPM)** will provide the AFPD with the most cost effective and efficient management of the project as possible, while working diligently in collaboration with AFPD. Our proposed team is well connected with the Pitkin County community and feels confident in their ability to deliver this exciting project with the upmost professionalism and attention. Given the Covid-19 pandemic, we have provided a team of three members so that we can be sure to be on site when needed in the event a team member is quarantined.

#### WHY US?

- Aspen community expertise
- Seasoned team of Project Managers who enjoy what they do
- Expertise in facilitating construction processes
- Our team has worked in mountain communities for 20+ years
- Have delivered over \$200M in publicly funded projects with FCI
- Currently working in Aspen and have team members available for your project

**DPM** is comprised of A/E/C veterans who have decades of experience managing projects in Colorado mountain communities and a passion for collaboration. We have experience in all market sectors but specialize in municipal and k-12 education. A critical deciding factor in founding **DPM** was our desire to be an Owner's Representative that is fully engaged on the ground and focused solely on client goals and project implementation.



Our **Approach** follows five **business principles**:

1. **Creative Problem Solving** - Although our project managers specialize in public projects, we also have experience in other market sectors to help us think outside the box.
2. **Team Building** - We will manage the project closely and ensure everyone is held to their contract. However, we will also approach your project in a manner that builds a team that will work toward the same goal of performing with AFPD's goals in mind.
3. **Integrity** - Our firm is comprised of project managers that are trustworthy and dependable.
4. **Love of Learning** - We know every new project brings new learning opportunities for ourselves, but also for others.
5. **Tenaciousness** - We will work hard to ensure success on your project. We are passionate about the work we do, and we want to implement AFPD's vision for this project.

I have assembled a team of project management experts to support the efforts of your exciting housing project: Chris Penney, Reilly O'Brien, and myself. All three of us have worked together in the Roaring Fork Valley for almost a decade. As a team, we have delivered over \$200M of publicly funded projects with FCI Constructors, Inc. in Western Colorado. Reilly resides in Glenwood Springs while Chris and I live in Eagle County. I do not believe you could find a team with more experience working together on public projects in resort mountain communities with the passion we will bring to your project. We will listen, and we will ensure the AFPD is being fiscally responsible delivering much needed housing facilities for your staff.

Thank you again for your consideration and we look forward to the opportunity to discuss this further with you.

Sincerely,

Colleen Kaneda, Ph.D., PE, LEED® AP BD+C  
Principal | **Dynamic Program Management**  
P: 970.390.0312 | E: Colleen.Kaneda@Dynamicpm.co





# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.

Our proposed team has deep experience providing Owner's Representative services. We have served over 25 public sector clients in Colorado mountain communities. These project budgets ranged from \$100k - \$151M and we entered the processes at various phases in their schedules.

### MUNICIPAL CLIENTS

Our team has worked for more than 20 years on some exciting municipal projects with the following:

- Leadville/Lake County Fire
- City of Glenwood Springs
- City of Montrose
- City of Steamboat Springs
- City of Aspen
- Eagle County
- Eagle County Paramedic
- Eagle-Vail Metro District
- Garfield County Public Library District
- Lake County
- Routt County
- Town of Eagle
- Town of Vail

Our team feels at home in **Pitkin County**. Over the years, managing construction projects in the community, we have had the opportunity to get to know many people associated with a successful project - from non-profit employees to local subcontractors to community elected officials and leaders. The list below outlines the projects in which our team has worked in Pitkin County:

- City of Aspen
  - Burlingame Ranch Affordable Housing Development Phase III
  - Affordable Housing Study\*
  - Pedestrian Mall Improvements\*
  - Wheeler Opera House Renovation\*
  - New Police Department\*
  - Child Center Feasibility Study\*
- Aspen Community School Campus Redevelopment\*
- 2015 Bond Program, Roaring Fork School District - 26 projects\*
- Hotel Jerome Renovation\*
- Limelight Aspen Hotel Renovation



*\* indicates project completed with a previous firm.*



## RELEVANT EXPERIENCE. DELIVERING EXCELLENCE.

Our proposed team members have an array of municipal Colorado construction project experience. Below are some successful relevant projects in similar scope and complexity, featuring proposed team members and the project's associated reference.

### LAKE COUNTY FIRE STATION #2 LEADVILLE, CO | LAKE COUNTY



#### REFERENCE:

Jeff Fiedler, County Commissioner  
Lake County  
P: 720.209.8852

BUDGET: \$2.3M

COMPLETION DATE: December 2021

#### TEAM MEMBERS:

Colleen Kaneda  
Reilly O'Brien

**DPM** is providing Owner's Representative services to build a new fire station in the Southern portion of Lake County serving the Twin Lakes area. Over the course of several years and grant fundraising efforts, the project can now move forward. **DPM** was engaged as Lake County's Owner's Representative after a re-start of the project. We have helped procure a new design firm and are worked closely with the county-selected contractor. The building will be a combined facility with vehicle bays, office space and living quarters.



# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.

### BURLINGAME RANCH AFFORDABLE HOUSING DEVELOPMENT PHASE III

ASPEN, CO | CITY OF ASPEN

	<p>REFERENCE:</p> <p>Chris Everson, Affordable Housing Development Senior Project Manager City of Aspen P: 970.429.1834</p> <p>BUDGET: \$50M</p> <p>SIZE: 88,000 SF / 79 units</p> <p>COMPLETION DATE: September 2022</p> <p>TEAM MEMBERS:</p> <p>Chris Penney</p>

Burlingame Ranch is an affordable workforce housing development that is in its third and final phase. The city-developed affordable housing neighborhood is located across from Buttermilk Mountain. The third phase comprises of 25 (one-bedroom units), 17 (two-bedroom units) and 37 (three-bedroom units) ranging from 700 SF to 1,320 SF.

After analysis, the project team found several reasons why utilizing modular construction would be optimal for this project. One such decision-making factor to utilize modular construction was to avoid costly winter conditions and speed up schedule of delivery to future occupants. The 79 units will be manufactured offsite and delivered as approximately 230 modules to be assembled by a General Contractor on crawl space foundations. The final product has been designed to integrate with the previous development phases were traditional site-built construction.

Chris Penney, Senior Project Manager, is providing Owner’s Representative services for the City of Aspen for this final phase. The project involves working with various stakeholders to bring an affordable housing project to fruition. Our team members (Chris Penney, Reilly O’Brien, and Colleen Kaneda) have worked on other City of Aspen projects and understand entitlement processes within the City and Pitkin County. We also understand the dynamics of the community and elected officials and have experience preparing and giving presentations in Aspen.

# RELEVANT EXPERIENCE. DELIVERING EXCELLENCE.



## MONTROSE PUBLIC SAFETY COMPLEX MONTROSE, CO | CITY OF MONTROSE



REFERENCE:  
Jim Schied, Public Works Manager  
City of Montrose  
P: 970.417.8447

BUDGET: \$19M

COMPLETION DATE: 07/2022

TEAM MEMBERS:  
Colleen Kaneda  
Reilly O'Brien

To replace the existing Police Department building that is no longer meeting the Department and City's growing demand, the City of Montrose passed a bond to build a new 38,000 SF Public Safety Complex.

The facility includes an office area for all Police Department functions, a fitness center to serve the Police Department and City staff, a locker area for sworn officers, an evidence processing and storage area, a training room for the Police Department and to serve the new Police Academy functions, drive-in vehicle bays for investigations and other Police Department functions, and a Community Room for City, Police Department, and public use. The new facility will surround the existing Police Department building in downtown Montrose. The location will augment the municipal campus with the City Hall across the street.

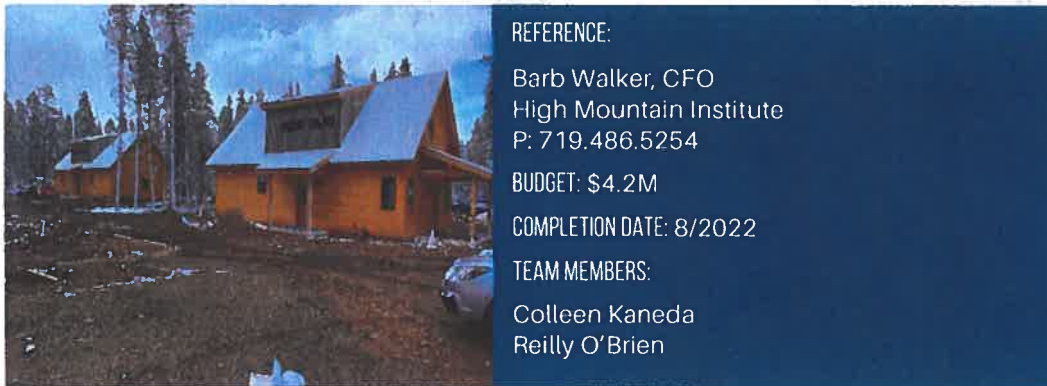
**DPM** is currently providing Owner's Representative services to the City of Montrose for their new public safety complex. We are working closely with the Director of Public Works, Chief of Police and City Manager to keep the project on schedule and budget. We are a few weeks away from a Guaranteed Maximum Price with the general contractor but expect it to be between \$13-\$14M.

# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.



### TEACHER HOUSING & ACADEMIC CENTER EXPANSION LEADVILLE, CO | HIGH MOUNTAIN INSTITUTE



Founded in 1995, the High Mountain Institute (HMI) is a private non-profit school providing outdoor education semesters or gap years for high school aged students across the nation. Over the years, HMI has continued to grow their curriculum and campus from 40 to 80 acres.

**DPM** is providing Owner's Representative services to expand faculty housing (multi-family and single family), improve their water and wastewater systems and work with them to plan their upcoming 10,000 SF academic center expansion set to start construction this spring. So far we have completed a 4-Plex multi-family faculty housing unit and three single family faculty houses.



# RELEVANT EXPERIENCE. DELIVERING EXCELLENCE.



## VAIL FIRE STATION NO. 3\* VAIL, CO | TOWN OF VAIL



### REFERENCE:

Mark Miller, Fire Chief (former)  
Town of Vail

BUDGET: \$5.3M

COMPLETION DATE: April 2011 (ahead of schedule)

### TEAM MEMBERS:

Chris Penney

To improve emergency response times, the Town of Vail commissioned a new 15,500 SF fire station to serve the west areas of town.

Located right off I-70, the facility is in a high-profile location near alternative transportation corridors and access points.

The Vail Fire Station No. 3 includes three apparatus bay areas, shift quarters for four on-duty firefighters, a dorm for up to 12 resident firefighters, and an administration / training area. The single-company station is the new headquarters for Vail Fire & Emergency Services.

The fire station's environmentally friendly features include increased outdoor air ventilation, natural lighting, low-flow water fixtures, and recycled and local building materials. Energy efficiency, ease of system maintenance, and system longevity were key factors driving the MEP design. The building received LEED® Gold certification.

Chris Penney represented the Town of Vail during both the preconstruction and construction process guiding the project to successful completion on time and on budget.

# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.



### 2015 BOND PROGRAM, ROARING FORK SCHOOL DISTRICT (STAFF HOUSING)\* BASALT, CARBONDALE, GLENWOOD SPRINGS, CO | ROARING FORK SCHOOL DISTRICT



#### REFERENCE:

Dr. Rob Stein, Superintendent  
Roaring Fork School District  
P: 970.384.6002

BUDGET: \$18M (staff housing component)

COMPLETION DATE: 2019

#### TEAM MEMBERS:

Chris Penney  
Colleen Kaneda  
Reilly O'Brien

In 2014, RFSD heard from over 1,400 community members through a visioning process that their top priority for their school district was facilities improvements and upgrades. All of this led to a facilities master plan which was used to create the list of projects to be included in the bond. In November 2015, voters passed a bond measure to support the facilities upgrades and improvements they wanted to see for their district.

As a component of the \$150M+ bond measure in 2015, Roaring Fork School District constructed, partnered, or acquired 66 staff housing units comprising of \$18M in bond funding. These units were equally spread between the three communities RFSD comprises: Glenwood Springs, Carbondale, and Basalt.

Colleen Kaneda, Chris Penney and Reilly O'Brien provided Owner's Representative services for all bond projects, including the staff housing. Our team created a developer RFQ/P for a PPP for a portion of the housing units in Glenwood Springs. We ran procurements and managed ground-up construction for the district-owned property in Carbondale. We worked with RFSD to finalize agreements with acquiring units in Basalt. Once the units were acquired or constructed, we assisted RFSD's committee process for housing guidelines and procurement of a property manager. RFSD's program is a leader in the state and the nation to provide affordable housing to retain high-quality staff in the district in a high cost of housing area.

*\* Indicates project completed with a previous firm.*



# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.



### WESTERN COLORADO PROJECT EXPERIENCE

- **Town of Hayden**  
Hayden Center Renovation  
Hayden Co-working/Education Center (historic) Renovation
- **Garfield County Libraries, Glenwood Springs, CO**  
Glenwood Springs Branch Library\*
- **Town of Eagle, Eagle, CO**  
Eagle River Kayak Park\*
- **Routt County / City of Steamboat Springs, Steamboat Springs, CO**  
New Combined Law Enforcement Building\*
- **City of Aspen, Aspen, CO**  
Burlingame Ranch Affordable Housing Development Phase III (*featured*)  
Affordable Housing Study\*  
Pedestrian Mall Improvements\*  
Wheeler Opera House Interior Renovations\*  
New Police Department\*  
Child Center Feasibility Study\*
- **Lake County, Leadville, CO**  
New Southern Fire Station (*featured*)  
Fire Station #2 Financial Review  
2021 Recreation Advisory Board Master Plan volunteer
- **City of Montrose, Montrose, CO**  
Montrose Public Safety Complex (*featured*)  
Amphitheater Improvement Project
- **Town of Vail, Vail, CO**  
Middle Creek Affordable Housing\*  
Vail Fire Station No. 3\* (*featured*)  
Vail Golf Clubhouse\*  
Ford Park Improvements Phases II & III\*
- **EagleVail Metro District, Eagle-Vail, CO**  
Golf Clubhouse Redevelopment Masterplan\*
- **Eagle County Paramedic, Edwards, CO**  
New Vail Mountain Rescue\*
- **Roaring Fork School District, Basalt, Carbondale, Glenwood Springs, CO**  
2015 Bond Program -27 projects\* (*featured*)
- **Plateau Valley School District 50, Collbran, CO**  
2021 Pre-bond Services (\$44M bond program)  
2021 BEST Grant Application  
2020 BEST Grant Application  
2019-2020 Master Plan\*

# RELEVANT EXPERIENCE.

## DELIVERING EXCELLENCE.



- **Steamboat Springs School District, Steamboat Springs, CO**
  - 2019 Pre-Bond & Post Bond Services (*\$80M bond program - 7 projects*)
  - 2020 BEST Grant Application
  - 2017-2019 Master Plan\*
  - 2018 BEST Grant Application\*
  - 2017 Pre-Bond & Post Bond Services (*\$14M bond program - 3 projects*)
- **Lake County School District, Leadville, CO**
  - 2019 Pre-Bond & Post Bond Services (*\$34M bond program*)
  - 2019 BEST Grant Application
  - 2017-2018 Master Plan\*
  - 2012 Bond Program\*
  - Play Yard Improvements - 2 projects\*: GOCO, DOLA Grants
  - Hazardous Material Abatement Project\*
  - 2013 BEST Grant Application\*
  - High School Renovation & Addition\*
  - District-wide Security Upgrades\*
  - West Park Elementary School Replacement
- **Summit County School District, Frisco, CO**
  - Multiple Bond Programs\*
- **Garfield County School District 16, Parachute & Battlement Mesa, CO**
  - 2014 Bond Program (*\$35M bond program - 9 projects*)\*
  - 2015 BEST Grant Application\*
- **Mesa County Valley School District 51, Grand Junction, CO**
  - Grand Junction High School BEST Grant Application & Master Plan
  - Orchard Mesa Middle School Replacement\*
  - 2021 Central High School Master Plan
- **DeBeque School District, DeBeque, CO**
  - New Elementary School Addition to Upper School\*
- **Meeker School District, Meeker, CO**
  - High School Addition / Major Renovation\*
  - 2019 BEST Grant Application
- **Montrose County School District RE-1J, Montrose, CO**
  - New Columbine Middle School\*
  - 2020 Roof Repairs BEST Grant Application
  - 2020 HVAC Upgrades BEST Grant Application
  - 2021 BEST Grant Application
  - 2021 Master Plan
- **Ridgway School District, Ridgway, CO**
  - 2021 BEST Grant Application
- **Hayden School District, Hayden, CO**
  - New Pk-12 School\*



## RELEVANT EXPERIENCE. DELIVERING EXCELLENCE.

- **Animas High School, Durango, CO**  
High School Relocation to Fort Lewis College Campus
- **Aspen Community School, Woody Creek, CO**  
2014 Campus Redevelopment\*
- **Ross Montessori Charter School, Carbondale, CO**  
2016 New Charter School\*
- **Colorado River BOCES, Garfield County, CO**  
2021 Master Plan - New Career Technical Education Center
- **High Mountain Institute, Leadville, CO**  
Teacher Housing & New Academic Center (*featured*)
- **Colorado Mountain College, Various Campuses**  
Student Housing Study, Breckenridge & Glenwood Springs, CO  
New Academic Center, Steamboat Springs, CO\*  
Gear Storage Building, Leadville, CO\*  
Mixed Use Cooper Commons, Glenwood Springs, CO\*
- **Hotel Jerome Renovation, Aspen, CO\***
- **Limelight Aspen Hotel Renovation, Aspen, CO**
- **Ritz Carlton Bachelor Gulch - Multiple Renovations, Avon, CO**
- **Lionshead Marriott, Vail, CO\***
- **Lodge at Lionshead, Vail, CO\***
- **Fairmont Vail (preconstruction), Vail, CO\***
- **Marriott Commons Space Renovation, Vail, CO\***
- **Multiple hospitality projects for Vail Resorts Development Company\***

*\*Indicates team members provided Owner's Rep services on these projects while all working together at another firm*



# PROPOSED TEAM.

## TRUSTED PARTNERS.

Our team has the expertise and passion to perform as AFPD’s trusted advisor.

### ORGANIZATIONAL CHART



### ROLES & RESPONSIBILITIES

TEAM MEMBERS	RESPONSIBILITIES
<b>CHRIS PENNEY</b> SENIOR PROJECT MANAGER	As Senior Project Manager, Chris will be responsible for all project operations from construction through warranty. Chris will be the main point of contact for AFPD, facilitate needed procurements, facilitate FF&E and technology, manage contracts, and be involved in oversight of the construction, move-in and closeout process. He will communicate AFPD decisions throughout construction to the project team. Chris lives in Edwards and is currently managing another project in Aspen.
<b>REILLY O'BRIEN, EIT</b> PROJECT MANAGER	Reilly, a resident of Glenwood Springs, will assist with document control, including budget, schedule, pay application reviews, and regular reporting. He will also be an additional resource during the move-in phase as that tends to need additional on-site hours.
<b>COLLEEN KANEDA, PH.D., P.E., LEED® AP BD+C</b> PRINCIPAL-IN-CHARGE	Colleen will be providing overall QA/QC for the project and ensure that AFPD receives the highest level of attention throughout the project. Colleen resides in Eagle.
<b>ADDITIONAL DPM RESOURCES, AS-NEEDED</b> <i>(administrative, technology support, etc.)</i>	DPM will provide other resources as the project may need from administrative tasks to in-depth schedule analysis. Chris will discuss with the decision makers if other resources may be utilized to benefit the project.



# PROPOSED TEAM. TRUSTED PARTNERS.

## CHRIS PENNEY

SENIOR PROJECT MANAGER | PRIMARY CONTACT

Chris has been in the construction industry for 20 years and has a wide range of public and private project experience. Chris's strengths include managing multiple stakeholders, while providing concise and transparent communication to all parties during all phases of a project. Chris is capable of providing a full scope of services including feasibility and proforma development, strategic planning, preconstruction / design management, construction management, procurement management, owner budget and schedule development and management, contract and change order negotiations, and public communications. Through any phase of any project, Chris enjoys the challenge of team building, coordination, and motivation. Chris is an Edwards resident and when not working, he enjoys the great outdoors with his two young sons.

### RELEVANT PROJECT EXPERIENCE

- Burlingame Ranch Affordable Housing Development Phase III, Aspen, CO
- Vail Fire Station No. 3, Town of Vail, Vail, CO
- Colorado Mountain College Housing Study, CO
- Middle Creek Affordable Housing, Vail, CO
- Aspen Community School Campus Redevelopment, Woody Creek, CO
- Hotel Jerome Renovation, Aspen, CO
- Limelight Aspen Hotel Renovation, Aspen, CO
- Ritz-Carlton Bachelor Gulch Renovations, Avon, CO
- 2015 District-wide Bond Improvement Program, Roaring Fork School District, CO (26 projects - includes staff housing)
- Vail Golf Clubhouse Redevelopment, Vail, CO
- 2016 Bond Program, Summit School District, Frisco, CO
- Waterfront Condo Feasibility Study, Wichita, KS
- Westbank Apartments Master planning, Wichita, KS
- Bennington Place Apartments, Wichita, KS
- Ritz-Carlton Philadelphia Renovations, Philadelphia, PA
- Ritz-Carlton Lake Tahoe (Preconstruction), Truckee, CA
- Ritz-Carlton Reynolds, Lake Oconee, Greensboro, GA
- Ritz-Carlton Coconut Grove Renovations, Miami, FL
- Ritz-Carlton Fort Lauderdale Renovations, Fort Lauderdale
- Stanly Ranch Auberge Resort & Spa, Napa, CA

### EDUCATION

BS, Civil Engineering, University of Kansas

### REGISTRATIONS / CERTIFICATIONS

Certified Construction Contract Administrator (CCCA)

Construction Documents Technologies (CDT)

### AFFILIATIONS / ORGANIZATIONS

Member, Lean Construction Institute (LCI)

### EXPERTISE

Site Safety

Project Budgeting

Construction Document Review

Building in Resort Communities

Solid relations with A/E/C Mountain consultants and contractors

### OWNER'S REPRESENTATIVE SERVICES

NORTH FORTY HOUSING PROJECT – THE FIRE PLACE



# PROPOSED TEAM.

## TRUSTED PARTNERS.

### COLLEEN KANEDA, PH.D., P.E., LEED® APBD+C

#### PRINCIPAL-IN-CHARGE

Colleen has over 24 years of industry experience as an Owner's Representative, General Contractor and Design Engineer. For the past 20 years, she has managed projects solely in Western Colorado. She is passionate about delivering high quality publicly funded projects on time and on budget by leading the project professional teams from design through occupancy. In her free time, Colleen enjoys skiing, soccer and camping with her husband and two sons.

#### RELEVANT PROJECT EXPERIENCE

- New Southern Fire Station, Lake County, Leadville, CO
- New Montrose Public Safety Complex, City of Montrose, Montrose, CO
- Teacher Housing & New Academic Center, High Mountain Institute, Leadville CO
- 2015 District-wide Bond Improvement Program, Roaring Fork School District, CO (26 projects - includes staff housing)
- Aspen Community School Campus Redevelopment, Woody Creek, CO
- Wheeler Opera House Renovation, City of Aspen, Aspen, CO
- Pedestrian Mall Improvements, City of Aspen, Aspen, CO
- Eagle River Kayak Park, Town of Eagle, Eagle, CO
- Ford Park Improvements Phase II & III, Town of Vail, Vail, CO
- New Vail Mountain Rescue, Eagle County Paramedic, Edwards, CO
- Marriott Commons Space Renovation, Vail, CO
- Pk-12 Replacement School, Hayden School District, Hayden, CO
- 2019 Bond Program, Steamboat Springs School District Re-2, Steamboat Springs, CO (7 projects)
- 2017 Bond Program, Steamboat Springs School District Re-2, Steamboat Springs, CO (3 projects)
- 2014 Bond Program, Garfield County School District 16, Parachute, CO (9 projects)
- High School Renovation & Addition, Meeker School District, Meeker, CO
- Columbine Middle School Replacement, Montrose County School District RE-1J, Montrose, CO

#### EDUCATION

PhD, Civil Engineering, University of Colorado Boulder

MS, Civil Engineering, University of Colorado Boulder

BS, Civil Engineering, Bucknell University

#### REGISTRATIONS / CERTIFICATIONS

Professional Engineer, CO

LEED® Accredited Professional

OSHA 10-Hour Certification

Certified Building Analyst

#### AFFILIATIONS / ORGANIZATIONS / VOLUNTEER

Adjunct Professor, Colorado Mountain College

CU Construction Engineering Advisory Board





# PROPOSED TEAM.

## TRUSTED PARTNERS.

### REILLY O'BRIEN, EIT

PROJECT MANAGER

Reilly provides Owner's Representative/Project Management services for both renovations and new construction on a variety of project types. With eight years of experience, he has worked for several seasoned Senior Project Managers and has implemented their best practices into his own working habits. Reilly learned an assortment of engineering software during his civil engineering master's program at CU Boulder and has been honing his skills with these programs. His software experience includes Microsoft Office Suite, Primavera P6, MS Project, GIS, @Risk, AutoCAD, MATLAB, Mathematica, and STELLA-Systems Modelling, R-Probability Analysis Software. During his free time, Reilly takes advantage of the Colorado mountains by skiing, mountain biking, and backpacking as often as he can.

#### RELEVANT PROJECT EXPERIENCE

- New Southern Fire Station, Lake County, Leadville, CO
- New Montrose Public Safety Complex, City of Montrose, Montrose, CO
- Teacher Housing & New Academic Center, High Mountain Institute, Leadville CO
- New Police Department, City of Aspen, Aspen, CO
- Pedestrian Mall Improvements, City of Aspen, Aspen, CO
- Basalt Middle School Renovation, Roaring Fork School District, Basalt, CO
- Glenwood Springs Middle School Renovation, Roaring Fork School District, Glenwood Springs, CO
- Basalt High School, Roaring Fork School District, Basalt, CO
- West Park Elementary pk-2 Replacement School, Lake County School District, Leadville, CO
- Pk-12 Replacement School, Hayden School District, Hayden, CO
- 2019 Bond Program, Steamboat Springs School District, Steamboat Springs, CO (7 projects)
- 2017 Bond Program, Steamboat Springs School District, Steamboat Springs, CO (3 projects)
- New Riverview pk-8 School, Roaring Fork School District, Glenwood Springs, CO
- Carbondale Middle School, Roaring Fork School District, Carbondale, CO

#### EDUCATION

MS, Civil Engineering, University of Colorado Boulder

BS, Civil Engineering, University of Colorado Boulder

#### REGISTRATIONS / CERTIFICATIONS

Certified Engineer in Training, Colorado

#### EXPERTISE

Master Budget Management

Master Schedule Management

Document Control

Strong Communication Skills with all Stakeholders

Western Colorado Project Experience

Deep knowledge of public project reporting requirements



# FEE PROPOSAL.

## 100% TRANSPARENT.

We pride ourselves on tailoring our services to meet the needs and expectations of our clients. We are proposing a lump sum fee structure. If the fee or hourly effort does not appear to align with your expectations, we would be happy to discuss creative ways to service AFD within the parameters needed for your budget and scope.

**Fee & Staffing Proposal - Aspen Fire Protection District - Fire House Project  
March 24, 2021**

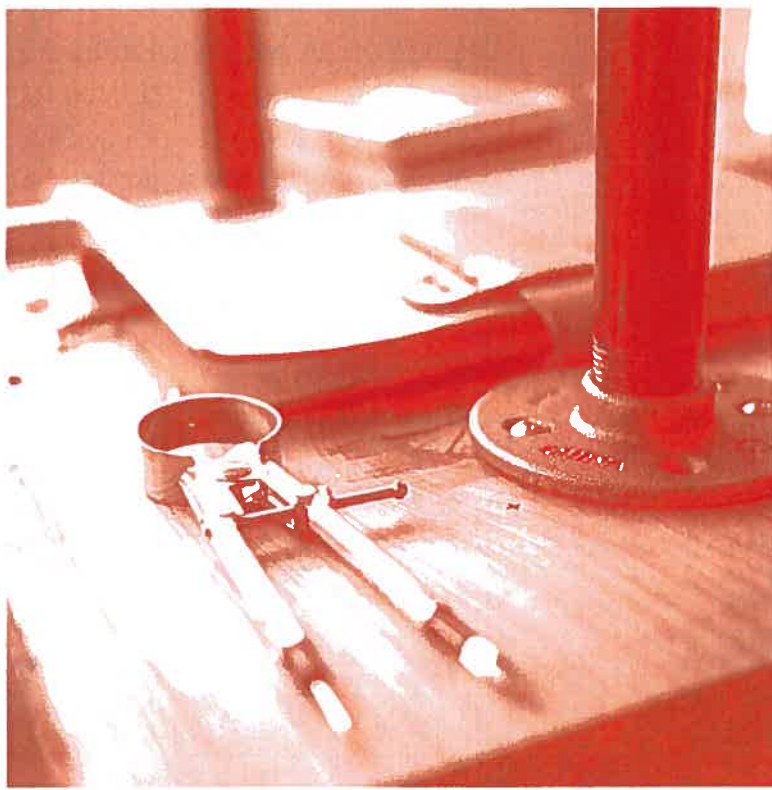
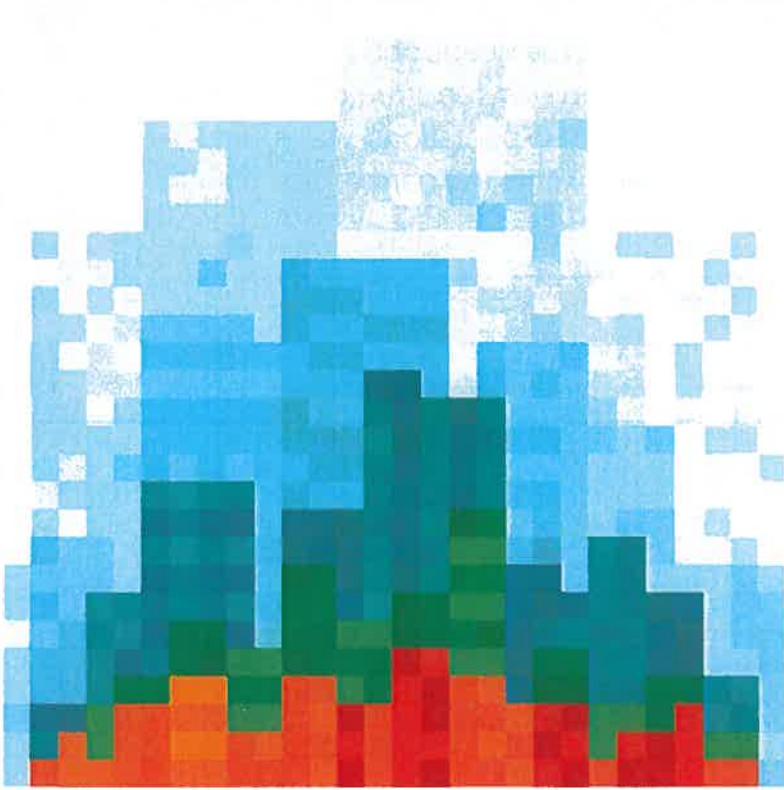
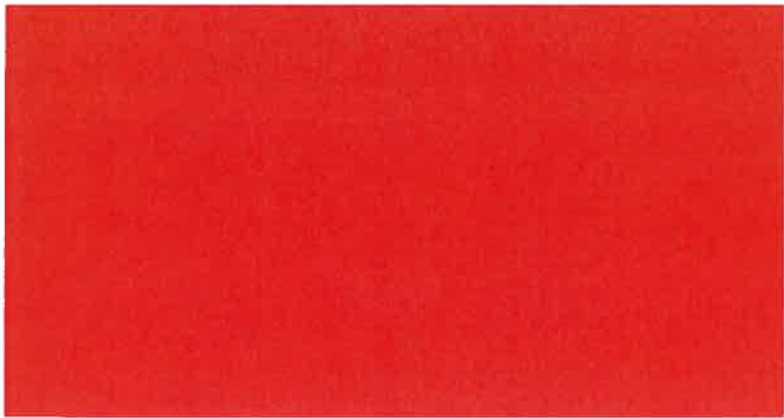
Construction: April 2021 - June 2022							
Team Member	Avg Hours / Week	Hours / Month	Hourly Rate	Fee / Month	# Months	Total Fee	Total Hours
Colleen Kaneda	2	11	\$140	\$1,495	15	\$22,429	160
Chris Penney	10	45	\$135	\$6,079	15	\$91,190	675
Reilly O'Brien	6	25	\$120	\$3,048	15	\$45,725	381
<b>Totals</b>	<b>19</b>	<b>81</b>		<b>\$10,623</b>		<b>\$159,344</b>	<b>1,217</b>
<b>Construction Subtotal</b>		<b>\$159,344</b>					

Move-in / Close Out: July 2022 - September 2022							
Team Member	Avg Hours / Week	Hours / Month	Hourly Rate	Fee / Month	# Months	Total Fee	Total Hours
Chris Penney	8	35	\$135	\$4,676	3	\$14,029	104
Reilly O'Brien	9	40	\$120	\$4,850	3	\$14,549	121
<b>Totals</b>	<b>17</b>	<b>75</b>		<b>\$9,526</b>		<b>\$28,578</b>	<b>225</b>
<b>Construction Subtotal</b>		<b>\$28,578</b>					

Total Owner's Rep Fees		
Phase	Fee	Hours
Construction	\$159,344	1,217
Move-in / Close Out	\$28,578	225
<b>Total Owner's Rep</b>	<b>\$187,922</b>	<b>1,442</b>
Reimbursables	\$11,391	
<b>Total Fee Proposal</b>	<b>\$199,313</b>	

### REIMBURSABLE EXPENSES

Reimbursable expenses associated with travel will be billed to the project at cost + 10% administrative fee but will not exceed the proposed amount.



**DYNAMIC**  
PROGRAM MANAGEMENT

# **OWNER'S REPRESENTATIVE SERVICES**

## **NORTH FORTY HOUSING PROJECT – THE FIRE PLACE**

**ASPEN FIRE PROTECTION DISTRICT RFP**

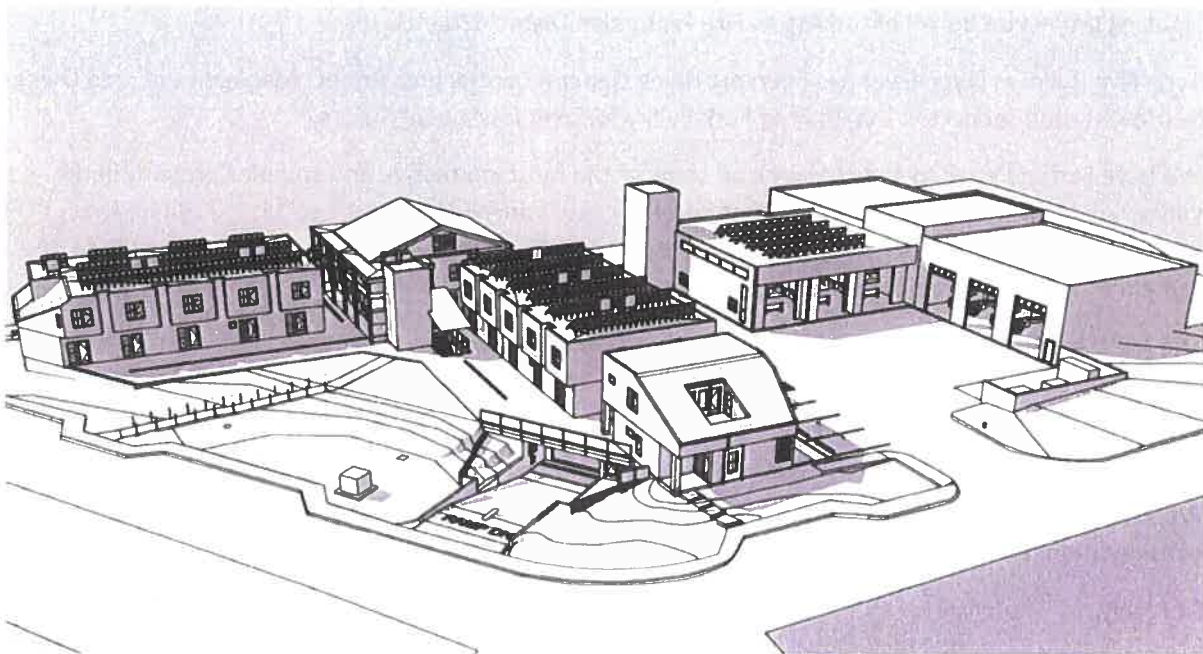


# RFP for The Fire Place

## Owner Representation

AFPD North 40 Housing

62 Sage Way, Aspen, CO 81611



**Contact:**

Sebastian Wanatowicz

Phone: 970-618-9169

Email: [sebastian@typefivebuilders.com](mailto:sebastian@typefivebuilders.com)

Mailing Address: PO Box 1562, Carbondale, CO 81623



March 24, 2021

Mr. Rick Balentine  
Aspen Fire Chief  
Aspen Fire Protection District

Dear Rick,

Thank you for the opportunity to provide a proposal regarding owner representation for the North 40 Housing project on behalf of the Aspen Fire Protection District (Client).

Type Five Builders (Type Five) has been providing General Contracting, Project Management, and Owner Representation services in the Roaring Fork Valley for over four twenty years.

We have had the good fortune to work on some of the most impressive and complex projects in the valley ranging from a 134,000 square foot hotel built over an existing garage to 15,000 square foot custom residential projects with over 250 pieces of structural steel. Regardless of the project type, the same methodology, team approach, and care are taken to ensure project success.

The AFPD housing presents the ability to use these combined skills to assist with a project that has an intrinsic community benefit and value proposition of keeping hard-working long-standing employees within the fabric of our community. It would be an honor to be part of the team to bring this project to fruition.

We greatly appreciate the opportunity to submit a proposal on this project. Thank you again for your consideration, and we look forward to discussing this project with you further.

Sincerely,

A handwritten signature in black ink, appearing to read "S. Wanatowicz", is located below the "Sincerely," text. The signature is fluid and stylized, with a large loop at the end.

**Sebastian Wanatowicz**

Owner | Type Five Builders | 970.618.9169 | [sebastian@typefivebuilders.com](mailto:sebastian@typefivebuilders.com)



## Company Overview

Type Five is a construction company specializing in high-end custom residential, select commercial, and hospitality projects, including ground-up building, remodeling, and owner representation services. Sebastian Wanatowicz is the Owner of Type Five and works with an internal project team and selective subcontractors, bridging the gap between design concept and delivery. Through Sebastian’s knowledge and skill in architecture, he provides expert problem-solving solutions to execute complex, high-quality projects in the mountain environment. Type Five leads the project oversight and construction process with proven management systems and robust communication with the design team, clients, and vendors.

**Owner Representation:** Project Management, Quality Control, Project Team Selection, Entitlements  
**Construction Services:** Pre-Construction, Cost Estimating, General Contracting, Remodeling

Sebastian's professional career has focused on delivering high-quality projects through a high-touch experience, requiring expertise in project management, construction, and design. His degree in Architecture from the University of Colorado at Boulder has led him to utilize these skills to deliver a superior built product.

Type Five has the capacity of building multi-million-dollar homes on Red Mountain to project managing the remodel of Aspen's most beloved hotels. Sebastian’s reputation is widely known in the mountain west market for honesty, integrity, and a hard work ethic. His notable projects have provided him a depth of experience in some of the most complicated building projects in Aspen.

Type Five has defined the following business values representing the core of the services. These values are at the foundation of all client engagements:

### **Holistic Building Process**

Delivering a holistic building process begins by partnering to define the scope of work and schedule of values to match the client's expectations and understanding of the project.

### **Attention to Detail**

Through hands-on onsite management, care for each finish detail connection, and consideration of how materials interrelate, details don’t get overmissed.

### **Excellence**

Our team has a rigorous practice for the constant pursuit of quality. This persistence is the engine of success to achieve excellence.

### **Collaboration**

We view the contractor, architect, and design consultants as strategic partners. We work from a place of gratitude to see problems from all perspectives and move forward with a common goal to achieve something greater as a whole than the sum of its parts.





## Company Overview

### Professional Experience Summary

- Owner representative for Limelight Hotel Snowmass construction with a project value of \$51M.
- Owner representative for the Aspen Mountain Club Locker Room remodel and the replacement of the Sundeck roof with a project value of \$6M.
- Owner representative for the Aspen Mountain Club Restaurant remodel at the Sundeck with a project value of \$9M.
- Owner representative for the Limelight Hotel Aspen remodel with a project value of \$26M.
- Owner representative for a custom home in Castle Creek for land use entitlements and construction of a new driveway, 1.2 water acre pond and interior remodel with a project value of \$6M.
- General contractor for two luxury residences on Red Mountain, including relocating and restoring a 114-year-old historic structure. Total project value at \$45M in construction costs.
- General contractor for tenant improvements of the Aspen office and Denver office for a local award-winning architecture firm.
- Project architect for the Hotel Jerome remodel with a project value of \$25M.
- Project architect for the St. Regis Aspen remodel with a project value of \$45M.

### About Sebastian Wanatowicz

Sebastian Wanatowicz is the owner of Type Five, bringing over 20 years of experience in high-end construction, project management, architecture, and oversight of high-performing teams in the Aspen market. His significant experience, depth of technical acumen, and long-term relationships with designers provide clients a high-touch building experience. Sebastian will lead this engagement as the one point of contact for the Fire Place team.

- Bachelors in Environmental Design and Architecture, University of Colorado at Boulder, 1997
- Licensed General Contractor, B.E.S.T. Certification
- Licensed Architect, AIA
- Design-Build Institute of America
- American Society of Professional Estimators
- Association for the Advancement of Cost Engineering



## **Type Five Approach to Scope of Services**

**In response to RFP items 6.1.1 through 6.1.8**

[6.1.1]:

- Work with the Owner, Architects, and their Consultants to maintain budgetary and schedule goals for the project.
  1. Continually review and monitor the budget and schedule to guide the process and ensure the scope of work aligns with the schedule of values.
  2. Facilitate ongoing value engineering exercise to assist with Contractor buyout.
  3. Review look-ahead schedule updates from the Contractor to manage project timeline.
  4. Review and respond to ongoing daily communications generated by the project team.

[6.1.2]:

- Attend weekly OAC meeting on site or virtual as needed.
  1. Guide the meeting to ensure the team remains on task.
  2. Provide meeting minutes comments, report on action items and follow up, as necessary.

[6.1.3]:

- Review monthly pay applications from the Design Team and the Construction Team.
  1. Review Design Team invoices to verify amounts align with the contract milestones.
  2. Review Contractor pay applications to ensure accuracy and verify the percentage of completion aligns with the billing and balance to finish. Review lien waivers.

[6.1.4]:

- Review any change order request and recommend action by the AFPD.
  1. Provide a detailed review of all change orders based on the remaining balance of contingency and any associated schedule impacts to recommend the best course of action.

[6.1.5]:

- Monitor all allowances and keep the AFPD updated.
  1. Request Contractor to provide sub-contractor scopes of work once defined to compare against budget allowances and communicate any discrepancies to AFPD.



## **Type Five Approach to Scope of Services**

### **[6.1.6]:**

- **Attend monthly AFPD Board meetings and update the Board on budget, schedule, and any issues that may arise.**
  1. **Issue one report per month, containing an executive summary of the project progress, schedule status, budget status, and outlining any outstanding issues.**

### **[6.1.7]:**

- **Perform onsite inspections as needed to review means and methods and quality control in the best interest of the AFPD.**
  1. **Review onsite progress and comment as needed to ensure quality.**
  2. **Review Contractor safety protocols and procedures.**
  3. **Review Contractor daily logs.**

### **[6.1.8]:**

- **Create a final punch list with the Design Team and follow-up that the items are completed to the AFPD satisfaction.**
  1. **Create a punch list in conjunction with the Design Team and walk the project for quality control review as items are completed.**
    - **Onsite review and inspection of the work with the Design Team and assist with punch list documentation.**
    - **Coordinate the schedule with the Contractor for completion of each item.**
  2. **Project close-out:**
    - **Coordinate with the Contractor to provide all warranty documentation, Owner training, operation, and maintenance manuals including contact information for subcontractors.**
    - **Review third-party commissioning logs and test and balance reports.**



**Fee Structure Estimate**

If the overall cost or proposed staffing level does not meet your needs, we would appreciate the opportunity to review with your team to ensure the project has sufficient management coverage while meeting the project budget requirements. All work will be billed hourly at \$145 per hour; the following chart is an estimate of hours per month.

Year	Hourly Rate	2021										TOTAL
Staff Member		APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC		
<b>Hours Per Week</b>												
Sebastian Wanatowicz	145	15	15	15	15	15	15	15	15	15	15	
<b>Total Hours Per Month</b>		65	65	65	65	65	65	65	65	65	65	
<b>Total Fee Per Month</b>		9,418	9,418	9,418	9,418	9,418	9,418	9,418	9,418	9,418	9,418	84,760

Year	Hourly Rate	2022										TOTAL
Staff Member		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEPT		
<b>Hours Per Week</b>												
Sebastian Wanatowicz	145	15	15	15	30	30	5	0	0	0		
<b>Total Hours Per Month</b>		65	65	65	130	130	22	0	0	0		
<b>Total Fee Per Month</b>		9,418	9,418	9,418	18,836	18,836	3,139	-	-	-		69,064

<b>Total Project Fee</b>												<b>153,823</b>
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Average Monthly Fee: 10,255

Based on 15 months remaining until project completion based on the current construction schedule per Exhibit E.

**Reimbursable Expenses**

All reimbursable expenses associated with the project are included within the hourly fee proposal.



**General**

Type Five Builders appreciates the opportunity to provide you with this proposal. We are available to start work immediately. If you have any questions or if the scope has not been captured in the proposal response, please feel free to contact Sebastian Wanatowicz at (970) 618-9169 or email at [sebastian@typefivebuilders.com](mailto:sebastian@typefivebuilders.com). Otherwise, please sign the document in the space provided below.

**Client: Aspen Fire Protection District**

**Type Five Builders, LLC**

A handwritten signature in black ink, appearing to read "S. Wanatowicz", is written over a horizontal line. The signature is stylized and cursive.

Print Name: \_\_\_\_\_

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

Title: \_\_\_\_\_

Date: \_\_\_\_\_

\_\_\_\_\_

Sebastian Wanatowicz

Owner