



RESPONSE TO REQUEST FOR QUALIFICATIONS  
**EDGEWOOD COLESBURG  
COMMUNITY SCHOOL DISTRICT  
CONSTRUCTION MANAGEMENT  
AGENT SERVICES**  
EDGEWOOD, IOWA

CARL A. NELSON & CO.

**NELSON**

CARL A. NELSON & COMPANY  
1815 DES MOINES AVENUE  
BURLINGTON, IOWA 52601  
[WWW.CARLANELSONCO.COM](http://WWW.CARLANELSONCO.COM)

CONTACT:  
DAN CULP, DIRECTOR OF BUSINESS DEVELOPMENT  
319-754-8415  
[DCULP@CARLANELSONCO.COM](mailto:DCULP@CARLANELSONCO.COM)

## LETTER OF INTEREST

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Building Solutions Since 1913

December 9, 2016

Mr. Rob Busch Superintendent  
Edgewood-Colesburg Community School District  
403 West Union Street  
Edgewood, Iowa 52042

RE: RESPONSE TO REQUEST FOR QUALIFICATIONS - CONSTRUCTION MANAGER AGENT

Dear Mr. Busch:

We are proud to present our qualifications to provide Construction Management Agency services to the Edgewood-Colesburg Community School District. Successful projects are consistently delivered when the managing contractor is based on a qualification selection. This process will allow you to find the right partner that will fit within your system and look out for your best interest.

As your advocate on the project, we will be an open book to the school district staff and board of trustees. As cost and schedule specialists, we will look at components of the design (including structural, mechanical, and electrical) and explore opportunities for cost saving measures. We are very active in the design phase and will challenge the design team and Owner to evaluate alternative materials and systems to obtain the best value for the dollars spent. We respect your money like it is ours.

Our 104 years of operation in Iowa has resulted in a compilation of the best construction professionals in Iowa. Our employees stand behind our pledge of: Fairness and Honesty, Quality Workmanship, and Service Second to None. We take these core values seriously and work to instill the same values in the trade contractors that we work with as well.

We appreciate this opportunity and look forward to meeting with you to discuss why we believe Carl A. Nelson & Company is the best partner for your project.

Respectfully submitted,

Dan Culp  
Project Executive and Director of Business Development

## SECTION 1.0 - COMPANY INFORMATION



### MISSION STATEMENT

*Our mission is to focus on The Customer as the most important aspect of our business by providing exceptional value, while encouraging safety, leadership, and an entrepreneurial spirit among all employees.*

### CORE VALUES

*We will accomplish this mission through a team commitment to:*

***Fairness and Honesty***

***Quality Workmanship***

***Service Second to None***



### HISTORY + PHILOSOPHY

Carl A. Nelson & Company was established in 1913 by Carl A. Nelson who was a skilled carpenter and Swedish immigrant. Carl owned the firm until the 1940's when it became employee owned. Several descendents of Carl's founding team still work for the firm including a superintendent and project manager, both of whom have inherited the skills and work ethic of the company founders. In the early 1980's the firm expanded its geographic market area beyond southeast Iowa and started to complete projects nationwide with repeat customers. Project locations have spanned as far as New York; Ontario, Canada; Idaho and Florida. We have permanent offices in Burlington, Cedar Falls, and Muscatine Iowa and we share resources across all these offices to best serve our clients.

Carl A. Nelson & Company has a reputation for fairness and honesty with clients and subcontractors alike. We have been recognized for this by the Better Business Bureau with their Integrity Award. The fact that over 75% of our business is with repeat clients in a highly competitive market place attests to the value and quality that we bring to each project. Carl A. Nelson & Company is owned by 32 management and supervisory employees and has been employee owned since the 1940's. Virtually every project we work on has several employee/owners working on it. The project superintendent and executive we have proposed for this project are significant stockholders in our company. We believe this ownership structure creates a unique client focus that is not possible otherwise. We survey our customers and they have repeatedly given us high marks for our customer focus.

### FIRM COMPOSITION

We are a full service construction company with approximately 150 employees. We have offices in Burlington, IA; Cedar Falls, IA; and Muscatine, IA. Our 110 field employees are skilled in concrete, site cast tilt-up concrete, precast concrete erection, steel erection, carpentry and millwright services. We self perform about 50% of the work we contract for. Our site superintendents have an average of 31 years experience in construction and our project managers have an average of 21 years of construction experience.

### MANAGEMENT STAFF

Degreed Engineers:	11
Licensed Engineers:	3
Licensed Architect:	1
Degreed Construction Management:	3
Degreed Industrial Technology:	5
LEED AP Professionals	1
LEED BD+C Professionals:	2
Certified Public Accountant:	1



# SECTION 2.0 PRINCIPAL OFFICE/CORPORATE STRUCTURE

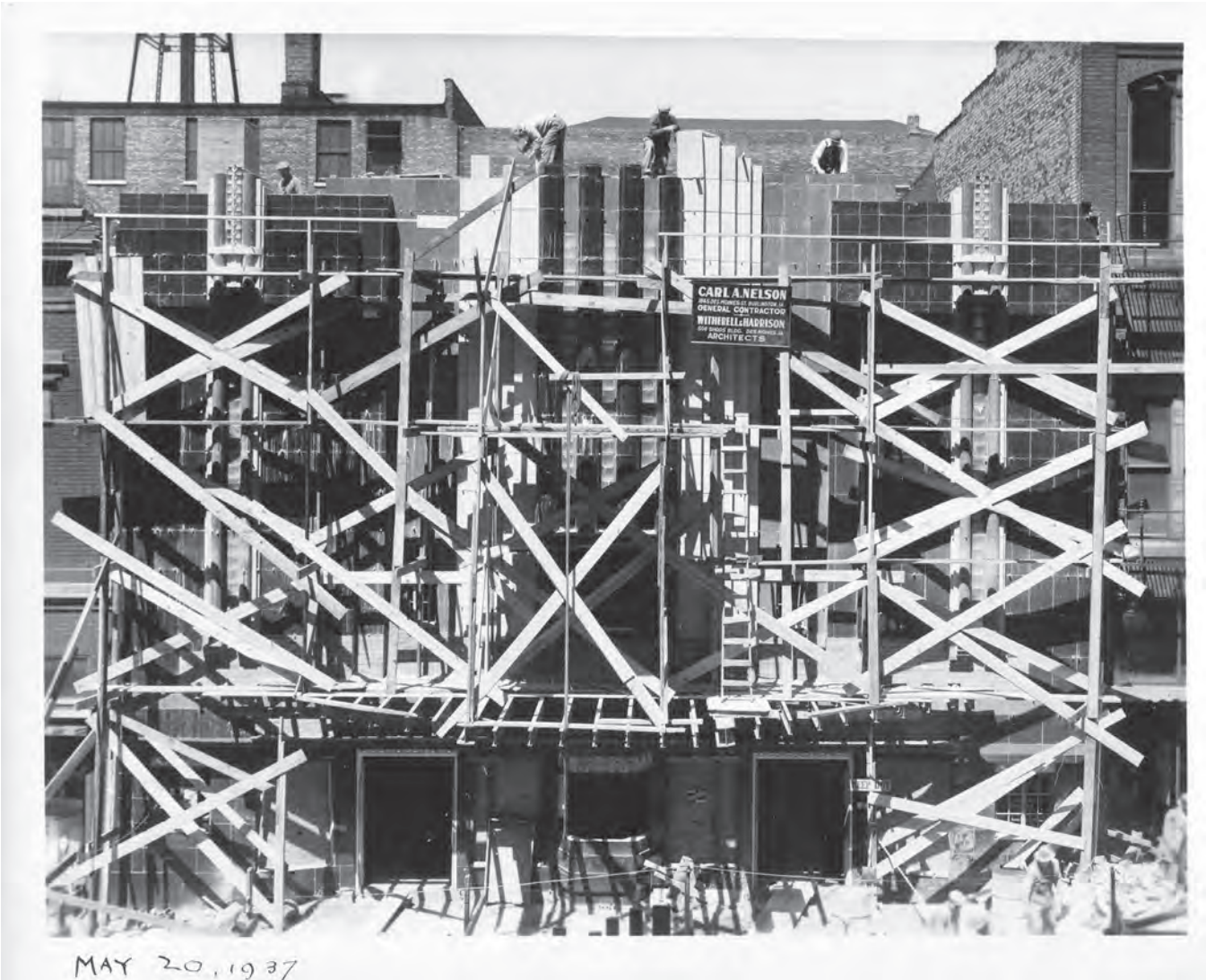


CARL A. NELSON  
1886-1948

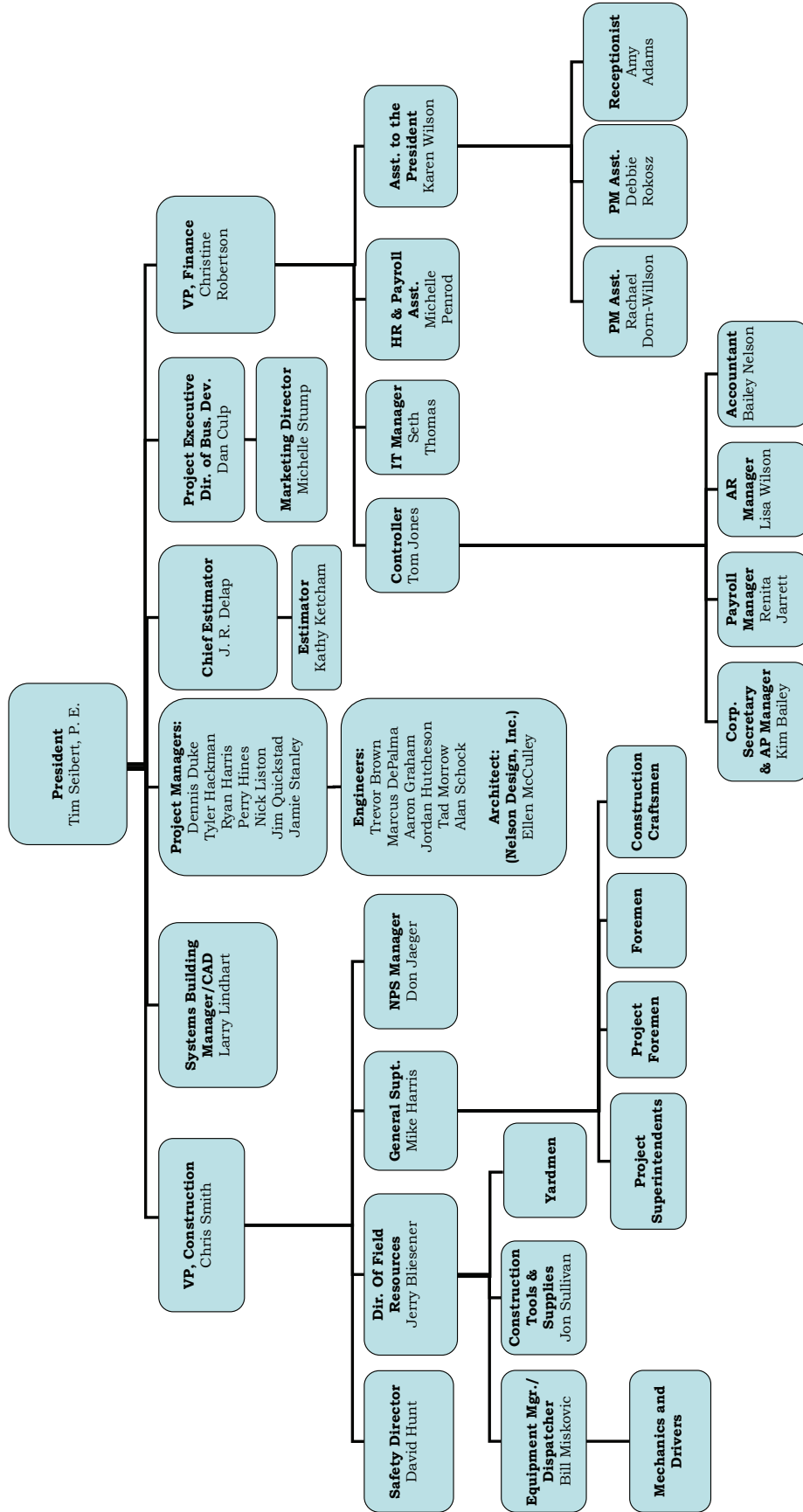
## PRINCIPAL OFFICE/CORPORATE STRUCTURE

Carl A. Nelson & Company’s principal office is located in Burlington, IA and our Cedar Falls office will serve this project. Our corporate organizational chart and a list of our Project Management and Supervision personnel appears on the next two pages of this proposal.

The Project Executive and Project Manager assigned to your project are Owners of Carl A. Nelson & Company. Dan Culp will serve as your Project Executive, Nick Liston will serve as your Project Manager and Bill Curler will serve as your Project Superintendent.



Corporate Organization Chart



## SECTION 3.0 TEAM ORGANIZATION/KEY PERSONNEL



### MANAGEMENT PERSONNEL

The bottom line performance of any business is directed by the hard work and skilled efforts of the management team. Our personnel are both experienced and aggressive in continuing and guiding our growth. These individuals include:

#### OFFICERS

- Tim Seibert, P.E., President
- Chris Smith, Vice President, Construction
- Christine Robertson, Vice President, Finance and Treasurer
- Kim Bailey, Corporate Secretary/Administration Manager
- Jim Quickstad, Senior Project Manager

#### PROJECT MANAGERS

- Dennis Duke, LEED AP BD+C
- Tyler Hackman
- Ryan Harris
- Perry Hines
- Nick Liston
- Jim Quickstad
- Chris Smith
- Jamie Stanley

#### DIRECTOR OF BUSINESS DEVELOPMENT/PROJECT EXECUTIVE

- Dan Culp

#### ARCHITECT

- Ellen McCulley, AIA, NCARB, LEED AP

#### SYSTEMS BUILDING MANAGER/CAD

- Larry Lindhart

#### DIRECTOR OF SAFETY

- David Hunt

#### CHIEF ESTIMATOR

- J.R. Delap, LEED AP BD+C

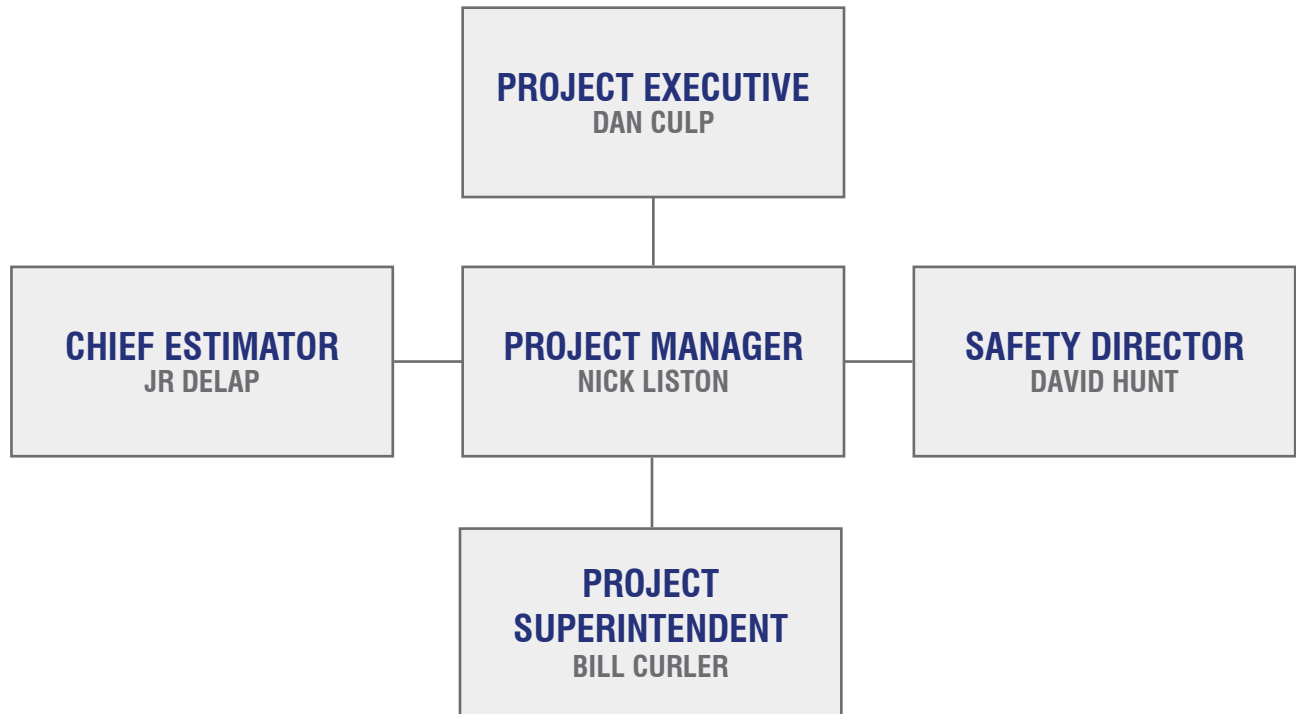
#### DIRECTOR OF FIELD RESOURCES

- Jerry Bliesener

#### PROJECT SUPERINTENDENTS

- Mike Harris, General Superintendent
- Jim Amann
- Dan Blaesing
- Randy Byrum
- Brent Conner
- Bill Curler
- Mark Hall
- Mike Hall
- Randy Harris
- Wayne Heidbreder
- Kevin Jackson
- Steve Jones
- James Maletta
- Corey Mumme
- Martin Miille
- Melvin Rich
- John Woslager

### PROJECT ORGANIZATION



#### PROJECT TEAM

##### PROJECT EXECUTIVE

Dan Culp, Director of Business Development for Carl A. Nelson & Company, will serve as your Project Executive and be primarily involved during the design phase of the project. Mr. Culp has 28 years of experience and will be a resource in the review and budgeting of the project. His experience includes numerous educational construction management projects. Dan will be involved in both the pre-construction and construction phases of your project.

##### PROJECT MANAGER

With 21 years of construction experience, Nick Liston will lead the project for Carl A. Nelson & Company and serve as the main contact with all team members. Mr. Liston's experience includes a variety of projects with a focus on education. Nick provides technical expertise and project leadership. He will be involved in both the pre-construction and construction phases of your project.

##### PROJECT SUPERINTENDENT

Bill Curler has 24 years experience in construction. He has served as Project Superintendent, providing Construction Management Services for a variety of clients including the Mid Prairie Community School District in Wellman, Iowa.

Bill has also served as Project Superintendent on education projects throughout Iowa including Hiawatha, Iowa City, North Liberty, Cedar Rapids, Marion, and Urbana. Mr. Curler will be involved in the construction phase of your project.

##### CHIEF ESTIMATOR

JR will serve as the Chief Estimator for this project and brings 29 years of experience to the team. During the design process he will be very involved in providing conceptual estimating and evaluating value engineering options. Mr. DeLap has estimated numerous educational and renovation projects and will be involved in the pre-construction phase of your project.

##### SAFETY DIRECTOR

David Hunt is the corporate Safety Director. David has nearly 20 years experience in safety management. David will inspect the site to ensure that all safety goals are being met and to help pre-plan upcoming work for safe execution. Mr. Hunt will be involved in the construction phase of your project.



## SECTION 3.0 TEAM ORGANIZATION/KEY PERSONNEL



**DAN CULP**  
**PROJECT EXECUTIVE**

### PROJECT EXPERIENCE

#### **MID-PRAIRIE COMMUNITY SCHOOL DISTRICT MULTI SCHOOL ADDITIONS & RENOVATIONS, WELLMAN AND KALONA, IA**

- Agency Construction Management
- \$11,709,000

#### **WASHINGTON COMMUNITY SCHOOL DISTRICT NEW HIGH SCHOOL, WASHINGTON, IA**

- Agency Construction Management
- \$13,265,000

#### **WASHINGTON FREE PUBLIC LIBRARY REPLACEMENT LIBRARY, WASHINGTON, IA**

- Agency Construction Management
- \$5,371,050

#### **HENRY COUNTY HEALTH CENTER SURGERY ADDITION & RENOVATION, MOUNT PLEASANT, IA**

- Agency Construction Management
- \$15,500,000

#### **WASHINGTON COUNTY HOSPITALS + CLINICS ADDITION AND RENOVATION, WASHINGTON, IA**

- Agency Construction Management
- \$15,590,611

#### **KEOKUK COMMUNITY SCHOOL DISTRICT NEW MIDDLE SCHOOL, KEOKUK, IA**

- Prime Contract
- \$3,339,109

#### **FORT MADISON COMMUNITY SCHOOL DISTRICT HIGH SCHOOL ADDITION, FORT MADISON, IA**

- General Contract
- \$2,433,004

#### **MOUNT PLEASANT COMMUNITY SCHOOL DISTRICT NEW HIGH SCHOOL, MOUNT PLEASANT, IA**

- General Contract
- \$8,937,983

Dan has managed a variety of projects including civic, government, recreational, educational, healthcare and industrial construction. He has 28 years of experience in various project management delivery methods and has extensive experience in Construction Management projects for public and not-for-profit clients. Dan is an Owner of Carl A. Nelson & Company.

### RESPONSIBILITIES

- Provide input on design and constructability issues
- Provide input on bid packages and the bidding process

### ACADEMIC CREDENTIALS + CERTIFICATIONS

- Bachelor of Science in Construction Engineering, Iowa State University, 1989
- OSHA 10 Hour Construction Standards Outreach Program
- CPR / First Aid Certified

### AFFILIATIONS

- Master Builders of Iowa

### YEARS OF EXPERIENCE

- 28 Years Total
- 22 Years with Carl A. Nelson & Company



**NICK LISTON**  
PROJECT MANAGER

**PROJECT EXPERIENCE:**  
**EAGLE GROVE COMMUNITY SCHOOL DISTRICT**  
FEASIBILITY STUDY, EAGLE GROVE, IA

- Delivery: Preconstruction Services
- Cost: \$253,000

**WASHINGTON YMCA**  
NEW CONSTRUCTION, WASHINGTON, IA

- Delivery: Design-Build
- Cost: \$9,000,000

**KALONA RECREATION CENTER**  
NEW CONSTRUCTION, KALONA, IA

- Delivery: Construction Management Agency
- Cost: \$6,650,000

**IMMACULATE CONCEPTION CATHOLIC SCHOOL**  
REMODEL, CHARLES CITY, IA\*

- Delivery: General Contract
- Cost: \$253,000

**HAMPTON-DUMONT COMMUNITY SCHOOL DISTRICT**  
ELEMENTARY SCHOOL RENOVATION, HAMPTON, IA\*

- Delivery: Prime Contractor
- Cost: \$700,000

**JEFFERSON COUNTY HEALTH CENTER**  
IMAGING ADDITION & CLINIC MERGER, FAIRFIELD, IA

- Delivery: Construction Management Agency
- Cost: \$4,900,000

**FEDEX GROUND SHIPPING FACILITY**  
NEW CONSTRUCTION, WATERLOO, IA\*

- Delivery: Construction Management Agency
- Cost: \$1,100,000
- 

*\*project experience was prior to Carl A. Nelson & Company*

Nick joined Carl A. Nelson & Company in 2015 as Project Manager. In his 21 years of experience Nick has worked his way through the ranks in the field while earning his degree. Nick began his construction career as a general laborer, quickly climbing to Foreman, Superintendent and Project Manager. This type of experience is what makes Nick such a great asset for Carl A. Nelson & Company and our clients. He has managed a variety of projects including educational, industrial, retail and distribution. He provides excellent project leadership and technical expertise.

**RESPONSIBILITIES:**

- Responsible for project team performance and project success.
- Coordinates pre-construction services including overall schedule and budget development and management.
- Assigns and manages construction execution including self-performed work and subcontractor work.
- Communicates regularly with clients to insure their needs are being met.
- Assists the project superintendent with the execution of job site safety requirements.

**ACADEMIC CREDENTIALS + CERTIFICATIONS**

- Bachelor of Science , University of Northern Iowa, Construction Management
- Associates Degree, Hawkeye Community College

**AFFILIATIONS**

- Sigma Lambda Chi (International Construction Honor Society)
- Epsilon Pi Tau (International Honorary for Professions in Technology)
- Master Builders of Iowa (Scholarship Committee)

**TRAINING**

- OSHA 10 Hour Construction Standards Outreach Program
- OSHA 30-Hour Construction Standards Outreach Program
- Lead Safe Renovator

**YEARS OF EXPERIENCE**

- 21 Years Total
- 2 Years with Carl A. Nelson & Company

## SECTION 3.0 TEAM ORGANIZATION/KEY PERSONNEL



**BILL CURLER**  
**PROJECT SUPERINTENDENT**

### PROJECT EXPERIENCE

#### **MID PRAIRIE COMMUNITY SCHOOL DISTRICT HIGH SCHOOL REMODEL & ADDITION, WASHINGTON, IA**

- Agency Construction Management
- \$1,700,000

#### **CEDAR RAPIDS COMMUNITY SCHOOL DISTRICT MULTIPLE ELEMENTARY SCHOOL PROJECTS - HIAWATHA AND CEDAR RAPIDS, IA\***

- General Contract
- Cost Varies

#### **LINN-MAR COMMUNITY SCHOOL DISTRICT MIDDLE SCHOOL ADDITION & REMODEL, MARION, IA\***

- General Contract
- Cost Varies

#### **IOWA CITY COMMUNITY SCHOOL DISTRICT HVAC REPLACEMENT FOR ELEMENTARY SCHOOLS, IOWA CITY AND NORTH LIBERTY, IA\***

- General Contract
- Cost Varies

#### **CENTER POINT-URBANA COMMUNITY SCHOOL DISTRICT ELEMENTARY SCHOOL ADDITION & REMODEL, URBANA, IA\***

- General Contract
- Cost Not Available

#### **WESTERN DUBUQUE COMMUNITY SCHOOL DISTRICT NEW HIGH SCHOOL AUDITORIUM & REMODEL, EPWORTH, IA\***

- General Contract
- Cost Not Available

Bill joined Carl A. Nelson & Company in 2016 as a Project Superintendent with 24 years of experience. He has spent his entire construction career in the carpentry trades and supervisory positions. Mr. Curler maximizes construction productivity through proper planning of both performance results and safety. He draws on his years of experience to ensure quality construction from start to finish. Bill communicates well with the trade contractors and the management team keeping everyone on the same page and moving forward. He is dedicated to keeping his crews, subcontractors, and job-site visitors safe.

### RESPONSIBILITIES:

- Directs and manages all activities on the job site including self-performed work and the work of subcontractors.
- Assists the Project Manager and/or Project Engineer in schedule development and project sequencing.
- Communicates regularly with personnel staff to determine manpower requirements.
- Serves as Site Safety Officer and conducts weekly safety toolbox meetings and job site safety inspections.

### TRAINING

- OSHA 30-Hour Construction Standards Outreach Program
- OSHA 10-Hour Construction Standards Outreach Program
- Forklift Operator's Permit
- Aerial Work Platform Safety Completion
- 24-Hours Minimum of Construction Continuing Education Annually

### YEARS OF EXPERIENCE

- 24 Years Total
- <1 Year with Carl A. Nelson & Company

*\*project experience was prior to Carl A. Nelson & Company*



## SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS



### MID-PRAIRIE COMMUNITY SCHOOL DISTRICT MULTIPLE PROJECTS, KALONA AND WELLMAN, IOWA

Delivery Method: Construction Manager Agent

#### MULTI SCHOOL ADDITIONS AND RENOVATION

After passing a \$10,600,000 bond referendum, the Mid-Prairie Community School District began selection of a construction manager to lead their planned improvements. Carl A. Nelson & Company was selected unanimously.

Projects include additions to four of the five district schools and a new building to house the alternative high school and district central offices. When complete, new construction will total 22,000 SF and renovations will be approximately 55,000 SF.



Mid-Prairie Middle School: New geothermal heating and cooling system, replacement of all windows, new classrooms, parent resource center, offices, new computer lab, and renovation of computer lab for special education students.

Kalona Elementary School: New addition for an additional preschool classroom and renovation of existing preschool classroom.

Wellman Elementary School: New addition for kindergarten classrooms and renovation of existing classrooms.

Mid-Prairie High School: New addition to house art classroom and culinary arts lab.

Central Administration Building: New building to house offices and an alternative learning center.



Square Footage: 22,000 (Approx. New Const.)

55,000 (Approx. Renovation)

Final Project Cost: \$11,650,000

Completion Date: April 2017

Architect: Shive Hattery, Inc.



#### CONTACT INFORMATION:

Mark Schneider, Superintendent  
Mid-Prairie Community School District  
1635 Hwy 22 East  
Wellman, IA 52356  
P: 319-646-6093  
mschneider@mid-prairie.k12.ia.us

## SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS



### FAIRFIELD HIGH SCHOOL

#### ADDITIONS AND RENOVATIONS, FAIRFIELD, IOWA

Delivery Method: Construction Manager Agent



#### ADDITIONS AND RENOVATIONS

Originally built in 1939, this 135,363 SF building sits on 23.2 acres. With no major changes to the high school since 2002, the School District completed a district wide facility assessment study in 2005. Several areas of concern were identified, most of them with the high school building.

In 2012, Carl A. Nelson & Company was selected after presentations and site visits to be the Construction Manager Agent of the new addition and renovations to the existing building.



Our unique, big-picture plan was presented to the School District and provided solutions to their air-handling issues, lack of handicap accessibility, and concerns for building security and safety. The plan also provided upgraded classrooms, centralized student services, an enlarged music suite, improved locker rooms and additional storage space. We also recommended moving the front entrance grade to ground level and create a lobby and vestibule to the east of the main auditorium. With the relocation of the central office, we were able to provide more security and office-controlled access to the building.

Carl A. Nelson & Company assisted the Owner with architect selection and bond referendum public meetings in Fairfield and surrounding communities.

The actual construction was phased to work around the school calendar and allowed for minimal disruption to students and staff. Today, the high school is 160,393 SF and houses approximately 630 students and 75 staff members.

#### CONTACT INFORMATION:

Dr. Laurie Noll, Superintendent  
Fairfield Community School District  
403 S. 20th Street  
Fairfield, IA 52556  
P: 641-472-2655  
laurie.noll@fairfieldsfuture.org

Square Footage:	25,030 (Addition)
	32,810 (Renovation)
Final Construction Cost:	\$12,626,000
Completion Date:	August 1, 2015
Architect:	Strustructure Architects



## SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS



### WASHINGTON HIGH SCHOOL PERFORMING ARTS CENTER, WASHINGTON, IOWA

Delivery Method: Construction Manager Agent

#### NEW HIGH SCHOOL AUDITORIUM

After the passing of a bond referendum and successful fundraising efforts within the community, the District decided to move forward with the next step of their Master Plan which was an addition for the performing arts to the high school. Carl A. Nelson & Company was again selected to provide construction management services continuing our relationship with the Owner.

The new auditorium has seating for 700 people and connects to Washington High School. The stage is 36 feet deep. The design includes full "fly" space above the stage for special performances. There is an outside entrance to the auditorium which alleviates the need to access the high school during shows. However, students and faculty can enter the auditorium through a connection off the commons area. This connection also allows for overflow space during larger events. The auditorium was placed to connect with existing band and vocal rooms as well as allowing a seamless link for the music and theater departments.

This performing arts center houses a lobby, ticket booth, dressing rooms, green room, storage areas, restrooms, sound and audio visual rooms, and a set shop.

Square Footage: 23,000  
Final Construction Cost: \$6,810,000  
Completion Date: August 2016  
Architect: SVPA Architects, Inc.



#### CONTACT INFORMATION:

Dr. Mike Jorgensen, Superintendent (retired)  
P: 515-571-4303

Mr. Jeff Dieleman, Business Manager  
Washington Community School District  
404 West Main Street  
Washington, IA 52353  
P: 319-653-6543  
jdieleman@washington.k12.ia.u

## SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS



### WASHINGTON HIGH SCHOOL WASHINGTON, IOWA

Delivery Method: Construction Manager Agent

#### NEW HIGH SCHOOL ADDITION AND RENOVATION

The Washington Community School District selected Carl A. Nelson & Company to be their Construction Manager for their \$13 million high school addition and renovation project.

We constructed a two-story, 91,030 SF addition connected to the existing middle school. This subsequently became the new High School. The project also included 12,800 SF of renovation to the former middle school which now houses high school students. The project schedule was completed in two phases: the construction of the high school addition and the renovation of the former middle school.

The new construction included classrooms for science, math, social studies, foreign languages, vocational, agriculture, band and vocal music. The new gym, commons area and concession stand are centrally located for athletic events and lunch. A new, secure entrance was also added to provide the administrative staff improved control of the incoming traffic. The new high school is designed for approximately 600 students.

The renovation was completed while the school was occupied with minimal interruptions. Value engineering recommendations and material changes were made that improved the speed of the construction schedule.

Square Footage: 103,830 (combined)

Final Construction Cost: \$12,996,000

Completion Date: August 2012

Architect: SVPA Architects, Inc.



#### OTHER CMA PROJECTS FOR WCSD

Middle School Renovation and Boiler Replacement

Lincoln School Tuck Pointing/Brick Repair

Central Office Exterior Renovation

Washington High School Boiler Replacement

Stewart Elementary Tuck Pointing

Pre-School/Child Care Addition



#### CONTACT INFORMATION:

Dr. Mike Jorgensen, Superintendent (retired)

P: 515-571-4303

Mr. Jeff Dieleman, Business Manager  
Washington Community School District

404 West Main Street

Washington, IA 52353

P: 319-653-6543

[jdielema@washington.k12.ia.us](mailto:jdielema@washington.k12.ia.us)



# SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS

## WASHINGTON COMMUNITY SCHOOL DISTRICT EARLY CHILDHOOD CENTER ADDITION

### CONTRACTORS IN WASHINGTON

G&R Miller Construction Washington, Iowa  
J&L Construction, LLC Washington, Iowa

### CONTRACTORS WITHIN 55 MILES

Christner Contracting Ottumwa, Iowa  
Gary Sanders Masonry, Inc. West Point, Iowa  
West Branch and Tipton Roofing Co. West Branch, Iowa  
Winger Contracting Company Ottumwa, Iowa

### CONTRACTORS WITHIN 75 MILES

Shaw Electric, Inc. Davenport, Iowa

### CONTRACTORS WITHIN 125 MILES

Thorpe Water Development Co. Ankeny, IA

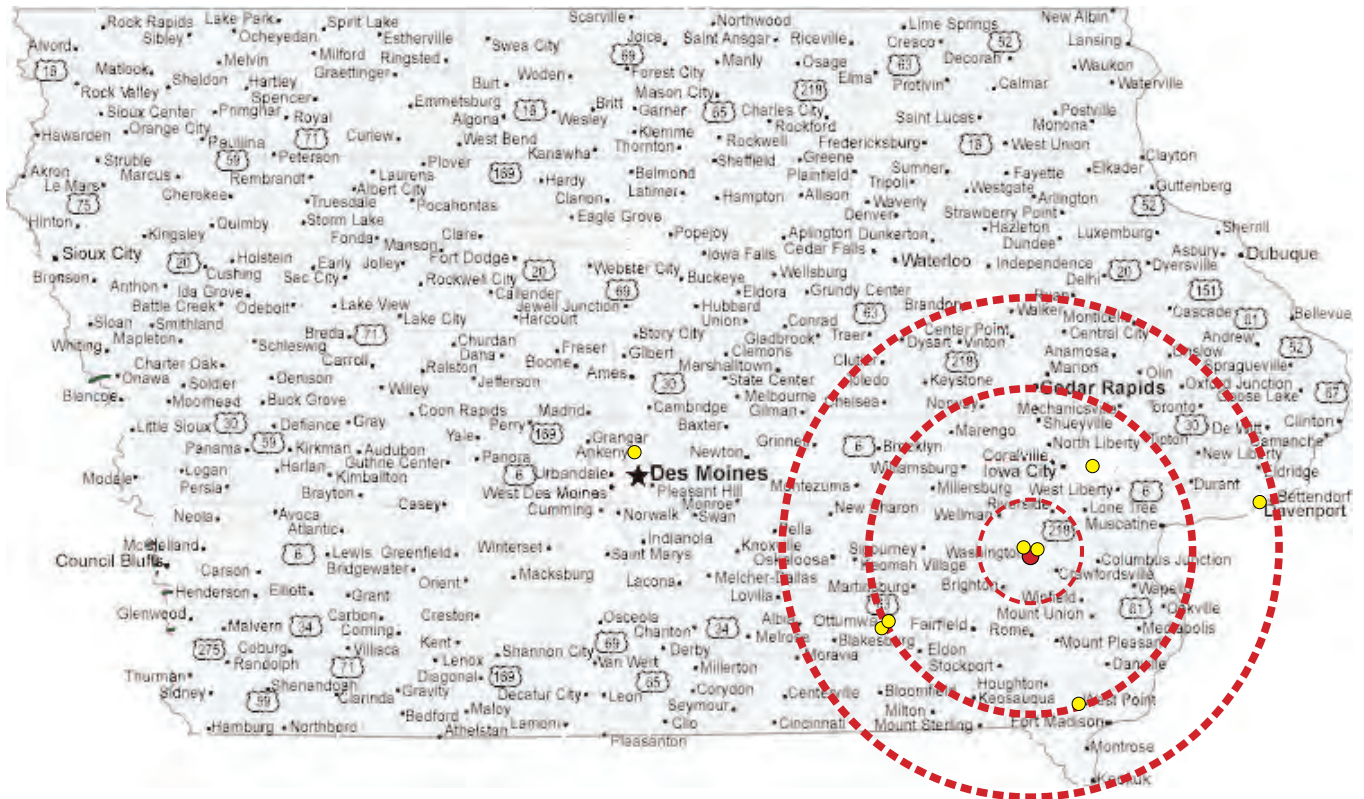
## LOCAL PARTICIPATION

We have selected the Early Childhood Education Center for the Washington Community School District as an example of our success utilizing local participation on projects. As you can see by the graphics on this page, we were able to utilize the efforts of numerous, local contractors.

As a public entity, you desire to keep your investment locally as much as possible. We will utilize the relationships we have and our extensive database of local and regional contractors to ensure that we have good bid participation and get the best value. During the bidding process, we communicate with the bidders to keep their focus on the project and to answer any questions that they might have.

Our experience with these contractors and the trust that we have built with them over the years results in better bid participation and lower bids. We will tailor the bid packages in the most cost effective manner for the District.

Another example of this proven experience appears on the next page.



# SECTION 4.0 RELATED EXPERIENCE AND QUALIFICATIONS

## MID PRAIRIE COMMUNITY SCHOOL DISTRICT

### HIGH SCHOOL ADDITION AND RENOVATION & NEW CENTRAL ADMINISTRATION BUILDING

#### CONTRACTORS WITHIN 30 MILES

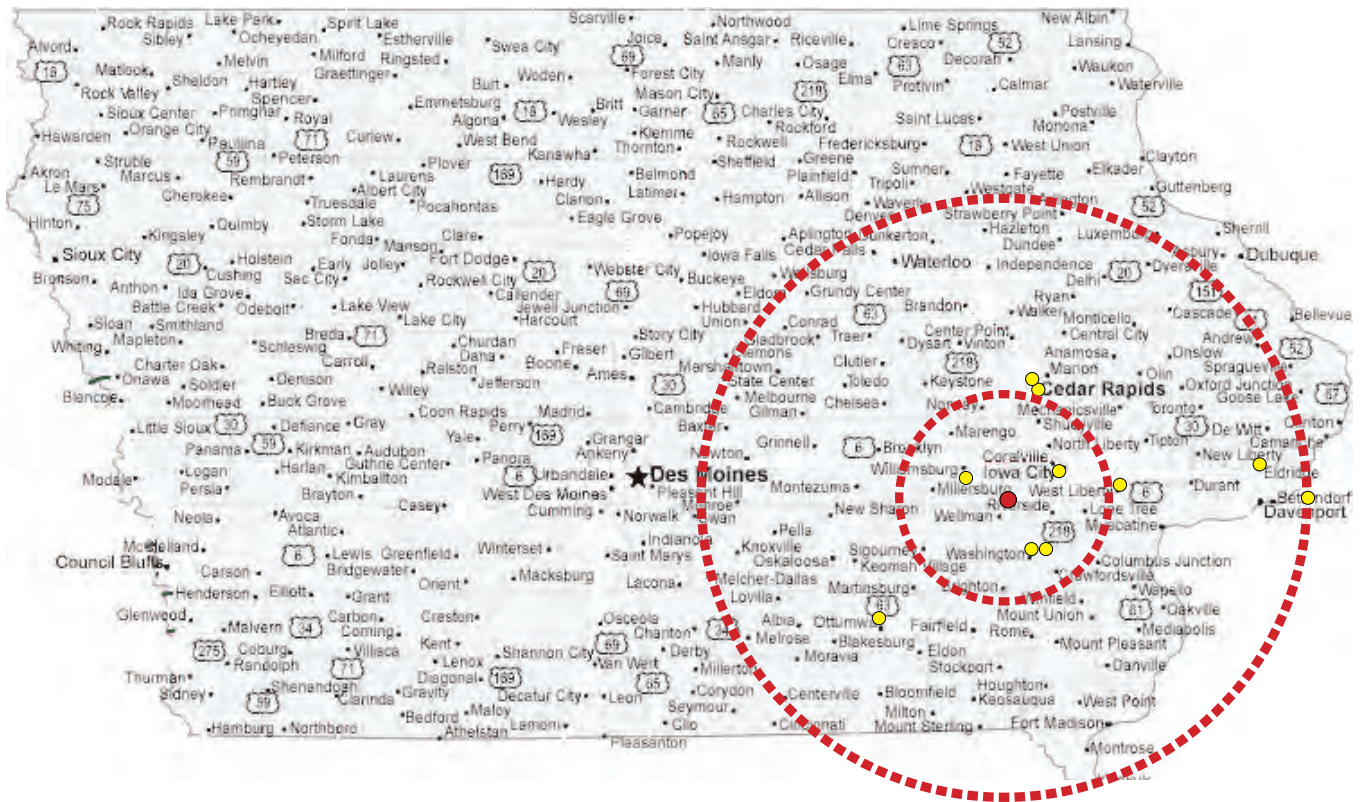
Ace Electrical	Washington, Iowa
All American Concrete	West Liberty, Iowa
DeLong Construction	Washington, Iowa
Evans Masonry, LLC	Parnell, Iowa
Rogers Construction	Iowa City, Iowa

#### CONTRACTORS WITHIN 50 MILES

D&S Sheet Metal, Inc.	Cedar Rapids, Iowa
Rapids Food Service Contract and Design	Cedar Rapids, Iowa

#### CONTRACTORS WITHIN 85 MILES

Christner Contracting, Inc.	Ottumwa, Iowa
Jim Giese Commercial Roofing, Inc.	Eldridge, Iowa
Kone, Inc.	Moline, IL





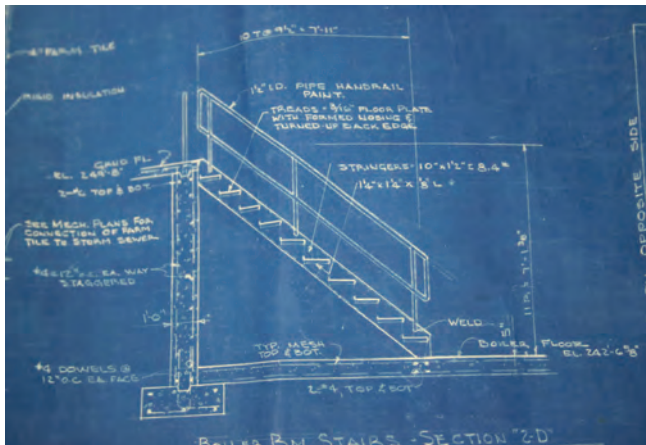
### PROGRAMMING AND PRELIMINARY DESIGN

As your Construction Manager, we will collaborate with the architect and the owner's staff to derive the best solutions for the construction of the project and the long term stewardship of the facility. In this delivery method, you are able to leverage the knowledge and expertise of the architect and CM to propose and analyze design options for "best value decisions" by the District at a time when these decisions can have the most positive impact on the project.

Our participation during the design phase will result in effective pre-construction planning, anticipation and resolution of design-related issues and sound advice on sequencing and phasing of the project. Carl A. Nelson & Company has a proven track record of working in collaboration with owners and architects to reach aggressive goals while reducing construction costs, field conflicts, waste and overall schedule.

As an agent of the owner, Carl A. Nelson & Company will manage the project with the District's best interest in mind whether it is design decisions or the resolution of construction issues. We will work with the architect to look for conflicts that can be solved during the design phase that will reduce change orders and extra costs to the project. We will make recommendations supported by appropriate data to give the architect, engineers, and the District options to be considered during design in order to get the best bid and life cycle cost available.

With the architect and engineers, we will work to understand the owner's desired outcome which will improve the team's ability to manage the projects costs and overall budget. Open communication and sharing of information will improve the likelihood that the project goals will be achieved.





## PRE-CONSTRUCTION PHASE

### VALUE ENGINEERING

Value engineering starts with an understanding of your goals for the new facility. Working as a member of the Project Team, we will help evaluate potential solutions that will meet the project goals within the set time and cost parameters. By starting early in the process with this evaluation, the broadest range of solutions, in both layout and in system selection, are available to the Project Team. The result will be the optimal solutions to meet your needs.

#### Example 1: Working with Designer to Optimize Schedule and Reduce Cost through Structural Design

Carl A. Nelson was just breaking ground on Great River Health Systems' 92,000 SF Eastman Plaza Medical Office

**27% Reduction in steel weight per square foot and a cost savings of \$132,000**

Building when hospital management determined that they needed twice as much space as anticipated. They also needed this additional space, named Mercy Plaza, two months earlier than the scheduled completion date for Eastman Plaza.

Great River Health Systems requested that Carl A. Nelson & Company provide pre-construction services, on a fast-track basis, that included working with the designers to develop a cost effective design that could be constructed in the compressed time frame. Carl A. Nelson & Company recommended a braced structural steel frame with bar joist for the building structure. This recommendation resulted in a 27 percent reduction in steel weight per square foot and savings of \$132,000 relative to the rigid structural steel frame that was used on Eastman Plaza. In addition, the simplified detailing and fabrication for the braced structural steel frame for Mercy Plaza resulted in the steel being delivered 12 weeks earlier than the steel for Eastman Plaza. The collaborative efforts of Carl A. Nelson & Company and the designers resulted in many other improvements in the Mercy Plaza. The results for Great River Health Systems were reduced costs and projects completed on time.

#### Example 2: Innovative Constructability Problem Solving through Product Selection and Task Sequencing to Prevent Cold Weather Delays

Carl A. Nelson demonstrated innovative constructability problem solving for Great River Medical Center's Eastman Plaza floor pours. The three-story building structure needed the first and second floors poured, on metal deck, in cold weather conditions, to create the stiffness needed for the pre-cast concrete wall panels. The basement walls enclosed the area below first floor, which allowed this space to be easily heated for the first floor concrete pour. The second floor enclosure on this highly exposed site, was much more difficult.



Working with the deck manufacturer and structural engineer, Carl A. Nelson implemented a unique deck fastening approach that allowed the composite deck to stiffen the building without the concrete in place, allowing the pre-cast wall panels to proceed immediately following the second floor deck installation. **The approach allowed the schedule to be accelerated and allowed the permanent pre-cast panels to be used for enclosure for the second floor slab pour, eliminating temporary enclosure costs.**

#### Example 3: Mechanical System Design Provides Long Term Savings

As the Construction Manager for Decatur County Hospital, Carl A. Nelson was challenged to keep the small replacement hospital within budget without sacrificing critical elements of the facility.

**The total savings to the Owner.... will be in excess of \$500,000**

During the early design phase it became apparent that the proposed HVAC was over budget. Carl A. Nelson & Company reviewed the mechanical design and made the recommendation to change from a water cooled chiller to an air cooled chiller.

After review of the supporting data provided by Carl A. Nelson & Company, the engineer agreed that our solution was better. This recommendation resulted in cost savings of \$140,000 at bid time and is estimated to save about \$19,000 per year on operational costs. The total savings to the Owner over the life of the chiller will be in excess of \$500,000.



### PRE-CONSTRUCTION PHASE

#### CONSTRUCTABILITY REVIEW

Concurrent with the value engineering effort, we will continuously monitor and review the proposed facilities to insure the design can be built efficiently with the highest possible quality product. A few examples of the scope of the constructability review are:

Evaluate the construction details related to allowances for industry standard tolerances to insure the highest quality finished product while allowing the implementation of efficient construction means and methods.

Verify that the selected building systems are compatible with the quantity and skill level of the local workforce, or determine where and how the proper resources can be brought to the project and what the budget impact will be.

Review the construction documents with the Project Team to verify that the drawings and specifications cover the needed requirements, but do not include requirements that will not or cannot be implemented. Excluding boilerplate requirements that will not or cannot be implemented will result in the lowest possible cost and the highest level of cooperation on the project.

Evaluate the building systems as they relate to the project schedule so the full cost of alternate systems and potential quality issues can be evaluated considering the weather conditions that may be present during the installation of a system.

The lead-time required for systems alternatives will be studied to determine if this lead-time fits into the schedule parameters. If it does not, can the system be finalized earlier in the design process to allow procurement to proceed while the remaining design work is completed? This fast track approach will get you into the new facility faster.

A facility constructed with the highest quality will serve your long-term needs only if it is constructed to allow proper and efficient maintenance of the facility. As a partner with you and the designers we will evaluate the maintainability of the facility as the planning progresses.

### PRE-CONSTRUCTION PHASE

#### ACCURACY OF SCHEDULES AND COST PROJECTIONS

##### CONCEPTUAL ESTIMATING

Conceptual estimating is a process where the estimator starts with schematic or design development drawings and descriptions and makes assumptions about the missing data to predict what the final design will be. Carl A. Nelson & Company combines project specific information with our historical information to fill in the data needed to predict the final design of the project. From this design prediction, we estimate the quantity of work required and its cost. The result of this process is a detailed estimate of the cost and a report disclosing all assumptions. The conceptual estimate will be available to the Project Team as the project moves from schematics to design development to construction documents. The detailed cost and related assumptions will be refined as the project design becomes fully developed allowing the Team to see if the costs have changed, and also why and where.

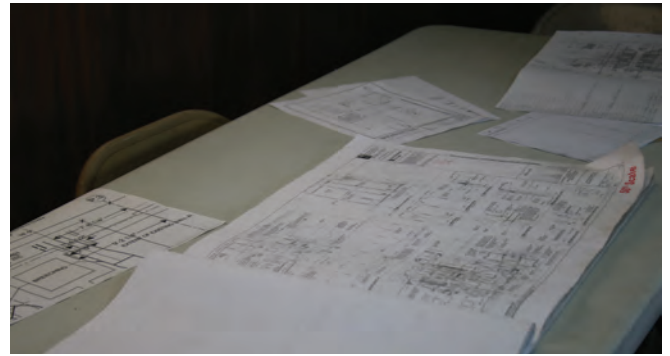
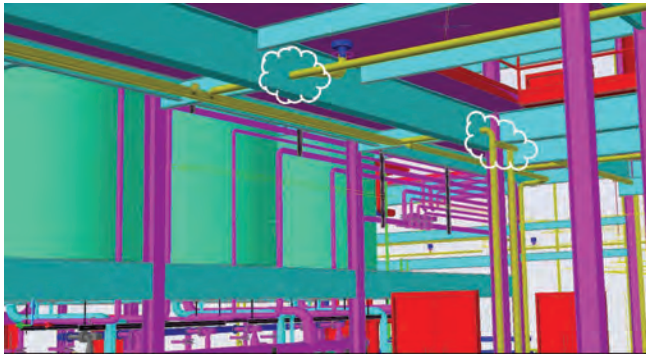
We estimate over two hundred million dollars worth of construction work annually with a substantial portion on a conceptual basis. In addition to providing Construction Management services, we perform a substantial amount of work with our own forces when providing general contracting services which includes:

- Division 2: Site Construction: Structural Excavation
- Division 3: Concrete: Slabs and Foundations, Equipment Foundations, Precast Concrete, Concrete Superstructures, Site Cast Tilt-up Concrete
- Division 5: Metals: Misc. and Structural Steel Erection
- Division 6: Wood and Plastics-Rough and Finish Carpentry
- Division 8: Doors and Windows
- Division 9: Finishes: Metal Studs and Drywall
- Division 10: Specialties
- Division 11: Equipment
- Division 13: Special Construction: Pre-Engineered Metal Building, Swimming Pools
- Division 14: Conveying Systems: Bridge Crane and Monorail Erection
- Division 15: Mechanical: Millwright Work

A large portion of our historical cost data is based on actual construction costs in Iowa. Therefore, we do not need to apply factors to attempt to adjust foreign cost data to local conditions. This experience results in predictable and controllable costs without surprises at the end after substantial investments in time and design costs have been made.







### PRE-CONSTRUCTION PHASE

#### ACCURACY OF SCHEDULES AND COST PROJECTIONS

##### ESTIMATING FROM CONSTRUCTION DOCUMENTS

When the design has progressed to complete construction documents or a complete portion, a final detailed estimate will be prepared and the cost and scope compared to the previous conceptual estimates.

At this point, we will prepare bid packages for the work and receive competitive bids from pre-qualified contractors and material suppliers. Detailed scopes of work will be issued for bidding to minimize scope problems later and to insure that no gaps or overlap exist in the bid packages. This results in the lowest possible bids with minimal change orders during construction.

Carl A. Nelson & Company has operated in the Midwest for over one hundred years. We are familiar with the capabilities of contractors and material suppliers. We will tailor the bid packages in the most cost-effective manner for the area. In addition to knowing the contractors and suppliers best suited for your work, we are also known by them. As a result of being a respected contractor, area bidders will provide the lowest bids possible for execution of the construction.

During our intensive estimating process, we will review the construction documents in detail to bring to light any errors or ambiguities found in the documents. Corrections are much easier and less costly to accommodate before contracts are issued and before materials are being fabricated. We will submit a detailed listing to the designers of any discrepancies found.

##### COST CONTROL

Carl A. Nelson & Company's approach to cost control is based on an understanding of the owner's goals. Cost control is an integral part of the project from schematic design through close out documentation. As the design progresses, we do conceptual estimating, constructability reviews, and pre-construction scheduling to ensure the project is on track. If adjustments need to be made, we collaborate with the owner and designer and suggest value engineering ideas that will bridge the budget gap. When the drawings are complete, we prepare a final estimate and create bid packages that are attractive to bidders to maximize bid participation. During the construction phase, we will manage the prime contractors for quality, cost, and schedule adherence. By developing accurate and detailed scopes of work and pre-bid schedules, Carl A. Nelson & Company will keep contractor changes on the job to an absolute minimum. Legitimate change requests will be reviewed in detail and independently verified to make sure you pay a fair price for the changes.

##### COST CONTROL SOFTWARE

Cost control is at the center of everything we do. We utilize Sage 300 CRE software (formerly Timberline) for our accounting and job costing control. This is a state-of-the-art, personal computer based system that includes job costing, accounts payable, payroll, accounts receivable, and general ledger. This system allows us to view data in the level of detail desired, and allows drilling down to see the makeup of aggregate numbers. Like any complex system, it is the capable Carl A. Nelson & Company staff that makes this system work for us and our clients. Our Field Supervisors and Management are aware of the costs on a project as it happens.

## PRE-CONSTRUCTION PHASE

### ACCURACY OF SCHEDULES AND COST PROJECTIONS

#### PRE-CONSTRUCTION SCHEDULING

Pre-construction scheduling is more than dropping activities, durations, and dependencies into a critical path method (CPM) software application and printing the results. Carl A. Nelson & Company is well known for our ability to meet difficult and even impossible schedules. One example of achieving an “impossible” schedule is the meeting facility Carl A. Nelson & Company constructed for Maharishi University. This design/build, pre-engineered, 60,000 SF building was designed and constructed in 30 days. The contract was signed the day after Thanksgiving and work was completed Christmas Eve. Crews worked around the clock during the coldest December in Iowa

history to finish the project on schedule. This schedule production ability starts with a complete understanding of the requirements and a solid plan to achieve the objective. We believe that the Construction Team has the best understanding of the

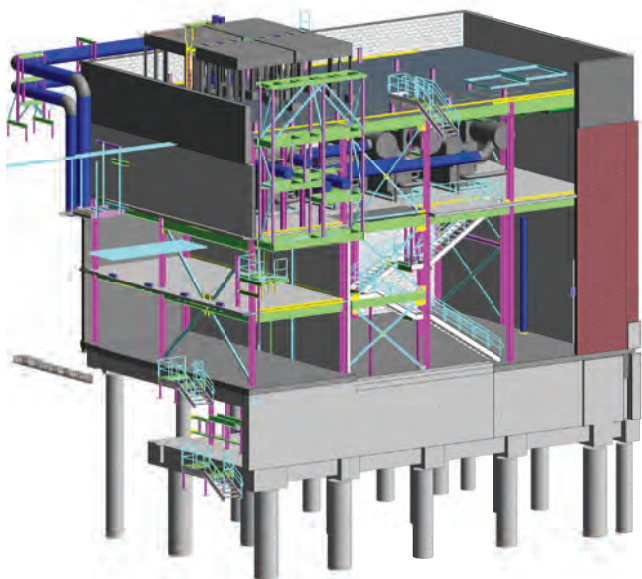
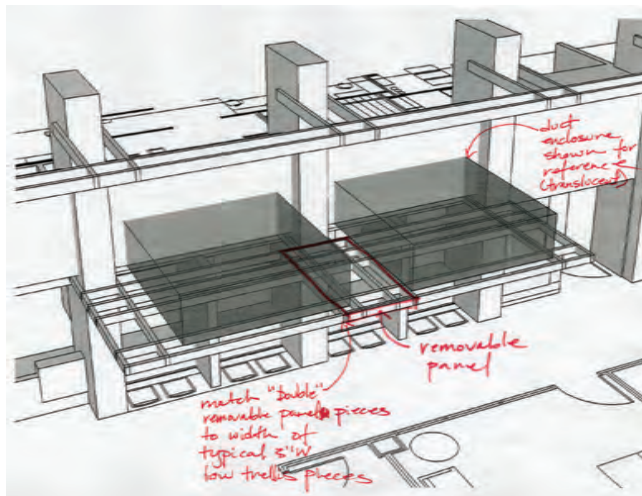
**...60,000 SF building was designed and constructed in 30 days.**

requirements and plan of attack and that they should plan the work. We do not bring in scheduling specialists or consultants to develop a schedule for our projects who are not an integral part of the project team through out construction. The result from a workable plan is a project where both high efficiency and high quality are produced.

The construction schedule will include activities for preparation and checking of submittals, approval of submittals, fabrication and delivery of long lead-time materials, and delivery of Owner purchased equipment.

We use Primavera Suretrak PM scheduling software that is user friendly so that the Project Team can use the software as a tool to plan the project the way it will be built. Our system will allow the Project Team to play “what if” on possible plans so the resulting sequence is the best for the project. Output from the scheduling system can be in the form of a network chart, bar chart, and list formats. All of the reports and output are based on the same data.

A construction schedule developed early in the process will support the value engineering and constructability efforts.







### PRE-CONSTRUCTION PHASE

#### ACCURACY OF SCHEDULES AND COST PROJECTIONS

##### COST SAVING STRATEGIES

Our approach to reducing project cost during the design phase is to examine opportunities where building elements could be altered that would not compromise overall quality for the Owner. For example, changing structural elements or the HVAC system that is not visible to most people but could have significant cost reductions. On the Decatur County Hospital project we recommended that they change from a water cooled chiller to an air cooled chiller that resulted in more than \$140,000 in construction savings, but more importantly will reduce operating costs by more than 40% per year. As requested, more examples of our history of reducing project costs for the Owner are listed in the Value Engineering section on Page 16.

##### BUDGET MANAGEMENT

Carl A. Nelson & Company's approach to cost control is based on an understanding of the owner's goals. Cost control is an integral part of the project from schematic design through close out documentation. As the design progresses, we do conceptual estimating, constructability reviews, and pre-construction scheduling to ensure the project is on track. If adjustments need to be made, we collaborate with the owner and designer and suggest value engineering ideas that will bridge the budget gap. When the drawings are complete, we prepare a final estimate and create bid packages that are attractive to bidders to maximize bid participation. During the construction phase, we will manage the prime contractors for quality, cost, and schedule adherence. By developing accurate and detailed scopes of work and pre-bid schedules, Carl A. Nelson & Company will keep contractor changes on the job to an absolute minimum. Legitimate change requests will be reviewed in detail and independently verified to make sure you pay a fair price for the changes.

**CONSTRUCTION PHASE**

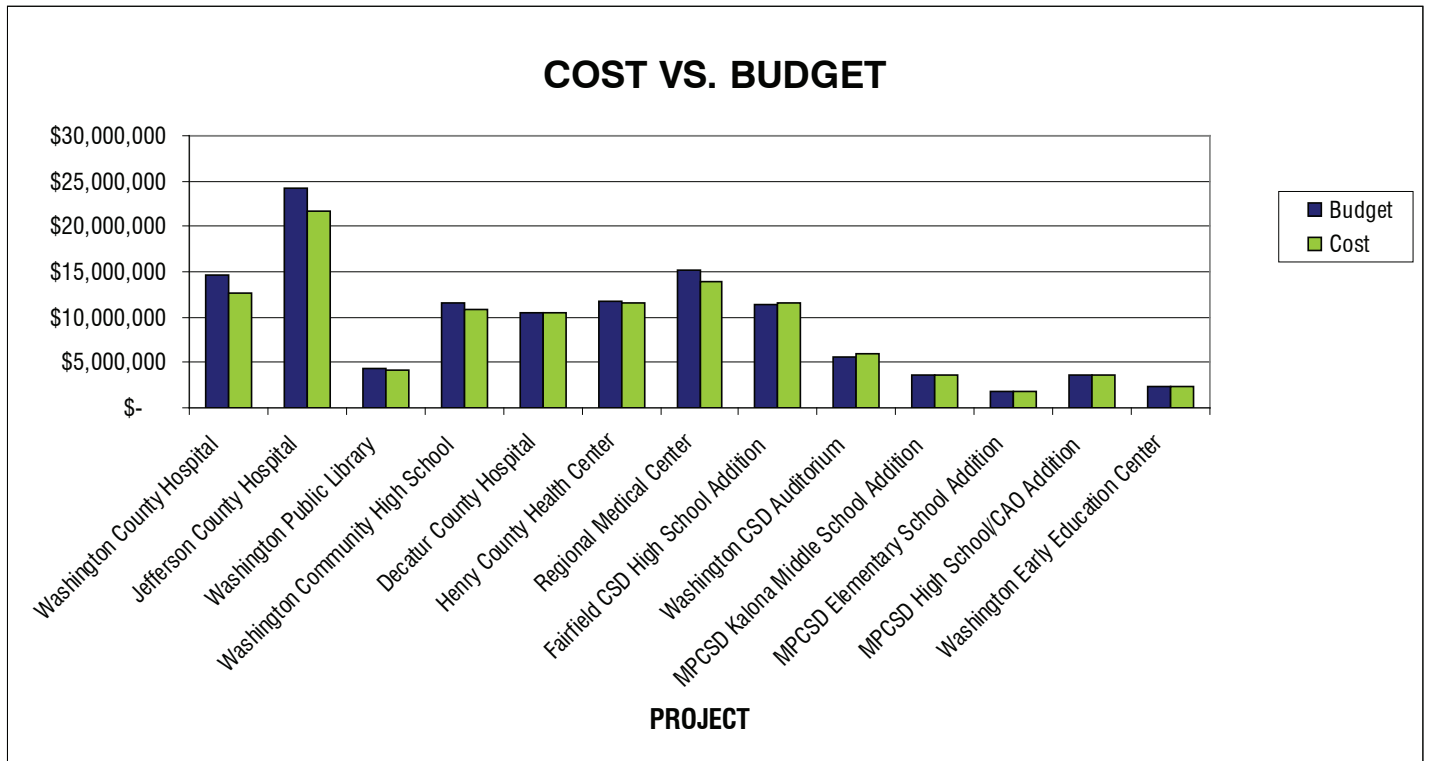
**BIDDING STRATEGY**

From the beginning of the project we plan our bidding strategy. Every project has unique issues that factor into how the bid market will perform. We look for local contractors that can add value to the project and we tailor bid packages to be attractive to them. Local contractors will take extra pride in working on their local schools. We also understand that not every local trade contractor will be qualified to execute the work so we expend great effort to market the project in the region. Our goal is to have no less than three bids for each bid package. In order to achieve this, we spend the time making one-on-one phone calls to solicit bidders. This effort has resulted in our project bids coming in 3.7% below our cost estimates.

**...resulted in our project bids coming in 3.7% below our cost estimates.**

**BID RESULTS**

The table below illustrates Carl A. Nelson & Company’s ability on recent construction management projects to accurately budget projects during the design phase. The blue bar on the left displays the original estimate cost. The green bar on the right conveys the actual bid results.





### CONSTRUCTION PHASE

#### CHANGE ORDERS

Our first goal is to minimize change orders by effectively managing the Pre-Construction process. Our constructability review and value engineering efforts often uncover design issues that can be changed during the design process saving cost and time. However, when we are presented with a change request, we will evaluate the request to determine that it is legitimate first and then confirm that the proposed price increase/decrease is fair.

#### SCHEDULE MANAGEMENT

##### SCHEDULING

The schedule prepared during pre-construction will be used as a working plan for the actual construction. We will update the CPM schedule monthly by reporting actual progress. The monthly update will include distribution of bar charts to all Team members showing actual progress in relation to planned progress and a narrative of the areas requiring additional attention. If major scheduling problems occur, the Team members will be brought together to develop a recovery plan.

We will prepare a three week look ahead work plan once a week to describe in detail the daily activities planned for the next three weeks. This document will be used as a tool to plan for the proper materials, equipment, and manpower that will be required to complete the planned work. The two-week look ahead work plan will be compared to the CPM schedule at each weekly coordination meeting to verify its adherence to the overall schedule objective. We will also identify the most critical activities on the project for that week so extra priority and preference will be applied to these important activities.

Through this process, we will work smart as well as working hard, to direct our efforts in areas where they can be the most effective to achieving the project's goals.

We include a complete schedule in the prime contractor agreements and contractually obligate adherence to the schedule milestones. Once contractors have been selected, we work with them to further refine how we will complete the work within the established milestones. As a result of considering contractor ideas, we develop a strong Team commitment to achieving the desired results. We also include strong contract terms in our agreements that allow us the tools we need to control the work.

Carl A. Nelson & Company has a long history of making the project schedule a high priority and our clients have recognized that effort. Over 70% of our projects are for repeat clients who value our attention to the details.





### CONSTRUCTION PHASE

#### GENERAL CONSTRUCTION DOCUMENTATION

We will maintain a complete and organized set of project files on the site to provide information support to the Construction Team. This will include construction drawings, addenda, bulletins, field orders, approved shop drawings, contracts, purchase orders, and requests for information.

Field Supervisors from Carl A. Nelson & Company will maintain a red line set of as-built drawings that are complete and accurate. We understand that these drawings are invaluable when the time comes to maintain or modify your facility.

Our Superintendent will maintain a daily log that contains vital information such as project staffing, weather, activities performed, and other pertinent data. We will maintain monthly project photos that are date stamped documenting the job progress.

#### COORDINATION

Weekly coordination meetings of the Construction Team will be held to review and coordinate the work plans for the week. This allows for efficient site operations and complete communication of where the project is headed so all contractors can plan to have the proper manpower, material, tools, and equipment available to meet the objective. Minutes will be produced to document the plan for the week.

Shop drawings will be thoroughly checked and completed by the preparer or they will not be accepted. Major problems that do not allow the preparation of complete shop drawings will be resolved before submittal. We will completely check all shop drawings and coordinate with others before submitting. Shop drawings will not be used on the project until they are approved. Approved shop drawings will be distributed to the proper parties in the proper quantity.

We will make requests for additional information in writing to the designer. The requests will be numbered and will provide space for a response. If clarification of the request is required, this will be done by phone with the results communicated in writing to all parties. Written responses will be distributed to all affected contractors. Requests for information will flow through a predetermined path within the Construction Team. We do not expect the designers to provide information we already have or can develop. We find this system provides an efficient means for information to be communicated.

### CONSTRUCTION PHASE

#### PERFORMANCE OF WORK BY PRIME CONTRACTORS, OVERSIGHT OF WORK AND COORDINATION OF THIRD PARTY INSPECTIONS QUALITY CONTROL

We believe that the management of the quality of a project starts long before ground is broken. The overriding determinate of the quality of a project is the quality of the people assigned to the project. We are proposing a Project Team that is second to none. Our Superintendent will be your full time, on site advocate to insure the quality and timeliness of the work. Our Superintendents average 32 years of construction experience. All of our Supervisors are required to successfully complete 24 hours of continuing education annually. Carl A. Nelson & Company course offerings include Soils Engineering, Field Leadership, HVAC Systems, and Concrete Mix Properties.

Quality results are achieved by understanding the requirements completely, planning for and expecting quality, and then verifying that we are getting what we expect. We will implement techniques to ensure that the work is done right the first time. We understand that poorly performed work redone after inspection will never result in the highest quality product.

We will make sure that the project requirements are communicated to the entire Construction Team. At any point in the process, Construction Team members will get clarification before proceeding if they do not fully understand the requirements, or if the requirements will not work. Some examples of how we will do this are:

- When construction estimates are being prepared, we will bring to light any questions that come up to allow corrections or amplification of the requirements before problems surface in the field. This is a good opportunity to double-check the construction documents.
- Shop drawings will be thoroughly checked and coordinated.
- Contractors' scopes of work will be thoroughly prepared and reviewed prior to bids being received. Document questions will be addressed to allow complete understanding of the requirements.
- Utilize quality checklists before activities start to be sure that all factors have been considered.



We will plan the project for quality. The foundation that supports that effort is a solid workable plan. Some examples of planning for quality we will do are as follows:

- Completing comprehensive constructability reviews to allow work to proceed as planned and as designed.
- Prepare a detailed CPM schedule that includes input from all Team members. The sequences will allow rough work to be complete before finish work to minimize damage to finished work.
- Preparing three week look ahead schedules for short-term coordination.
- Layout the site to allow efficient access and suitable storage for materials.

We will expect quality from our employees and contractors. We will convey this expectation by:

- Assigning employees to the project who have a demonstrated commitment to producing quality work.
- By reviewing prime contractors' abilities through first hand experience or by visiting projects completed by them and checking references to verify their commitment to quality work.
- Completing required mock-ups to set the standard of acceptable quality on this project.
- By taking pride in and responsibility for the work, whether it is planning, managing, organizing, supporting, or actually executing the work for this project.
- By rejecting marginally acceptable work the first time it occurs and making the quality commitment requirement clear to the responsible people.

We will inspect the work before others to insure that we are meeting the high expectation we have set for the project.



### CONSTRUCTION PHASE

#### PROJECT START-UP

We begin each project with a kick-off meeting to develop a team atmosphere and make sure that the Prime Contractors are fully engaged with the project goals and plan.

After contracts are issued, we will organize and manage a pre-construction meeting with all relevant parties to ensure a smooth project start.

When each contractor is about to begin work on the project site, each of their employees will participate in an orientation that covers Owner rules, job site rules, safety expectations and overall project expectations. Each employee that has completed the orientation will be given a sticker to place on their hardhat so we can easily identify these craftsmen.

During construction, we will manage and maintain precise records including weekly status reports, all permits, special testing and/or inspections, contractor pay applications, progress payments, safety issues, scheduling, any claims or disputed work items, submittals, deliveries, and surveying.

#### CONSTRUCTION CLOSE-OUT PUNCH LIST AND FINAL INSPECTIONS

Carl A. Nelson & Company will perform a punch list prior to requesting a final punch list by the Architect, Engineers and Owner. This punch list will be distributed to all contractors with the requirement for a timely completion. Carl A. Nelson & Company will manage this process to minimize unnecessary final punch list items.

As soon as the internal punch list is complete, the Architect will be requested to schedule a final punch list meeting involving the Owner, engineers and contractors. At the conclusion of the final punch list meeting, a completion date for all items will be established and the process will be managed for a timely completion.

During this time, we will also administer and schedule all final inspections and work with the Designer to issue a certificate of substantial completion.

When all conditions have been satisfied per contractual agreement, we will manage and recommend release of retainage or retainage withholdings. At this time, all lien releases will also be signed from all contractors.

#### OPERATION AND MAINTENANCE MANUALS

Carl A. Nelson & Company will assemble and submit an organized and complete set of Operations and Maintenance manuals. The manual will include the required manufacturer's data and will be segregated by divisions of work with the responsible contractor's contact information. We will submit the manual in an electronic file using Adobe Acrobat PDF file format. If requested, we will supply paper copies and provide training to staff.

#### AS-BUILT DRAWINGS

Carl A. Nelson & Company will maintain as-built drawings throughout the project and will submit the record set with changes noted to the Architect for their use in preparing a final CAD set of as-built drawings.

#### WARRANTIES

Carl A. Nelson & Company will manage the process of receiving and documenting warranties from each Prime Contractor and will include the executed warranties in the Operation and Maintenance Manual with the proper contact information for both the Prime Contractor and the supplier of the warranty.

Throughout the warranty period Carl A. Nelson & Company will support the Owner to resolve any warranty issue that may arise. Eleven months from the substantial completion date, Carl A. Nelson & Company will make a site visit with a representative of the Owner to review the building and identify any warranty issues that might be found prior to the end of the one year warranty period.

Rest assured, long after the warranty period, Carl A. Nelson & Company will continue to be a resource and advocate on construction related warranty issues that develop.



## SECTION 6.0 WORK VOLUME



Our current and projected volume of work fits perfectly with your anticipated start date for this project.

Carl A. Nelson & Company has ample manpower and capabilities to meet the proposed schedule for this project. Our project team will attend meetings as necessary and provide timely feedback on budget, value engineering and constructability issues in order to meet your goals.

Based on current staffing, our estimated company capacity is \$85,000,000.00 to \$100,000,000.00. Our current volume of work for 2017 is approximately \$52,700,000.

Construction Dollar Volume for last three years:

2016 - \$43,213,347

2015 - \$62,645,083

2014 - \$41,496,701

We look forward to getting started on your project.



**CERTIFICATE OF LIABILITY INSURANCE** Page 1 of 1

DATE (MM/DD/YYYY)  
11/30/2016

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

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

PRODUCER  Willis of Minnesota, Inc. c/o 26 Century Blvd. P. O. Box 305191 Nashville, TN 37230-5191	CONTACT NAME: PHONE (A/C, NO, EXT): 877-945-7378 FAX (A/C, NO): 888-467-2378 E-MAIL ADDRESS: certificates@willis.com
	INSURER(S) AFFORDING COVERAGE INSURER A: The Phoenix Insurance Company INSURER B: Travelers Indemnity Company of Illinois INSURER C: Aspen Specialty Insurance Company INSURER D: Travelers Indemnity Company of Connecticut INSURER E: INSURER F:
INSURED  Carl A. Nelson & Co. 1815 Des Moines Ave Burlington, IA 52601	NAIC # 25623-001 25674-001 10717-000 25682-001

**COVERAGES** **CERTIFICATE NUMBER: 24911730** **REVISION NUMBER:**

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

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PRO-JECT <input checked="" type="checkbox"/> LOC OTHER:			DT-CO-2F051029-PHX16	1/1/2017	1/1/2018	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 300,000
							MED EXP (Any one person)	\$ 10,000
							PERSONAL & ADV INJURY	\$ 1,000,000
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ 2,000,000
								\$
B	<input checked="" type="checkbox"/> AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY			DT-810-2F051029IND-16	1/1/2017	1/1/2018	COMBINED SINGLE LIMIT (Ea accident)	\$ 1,000,000
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
C	<input type="checkbox"/> UMBRELLA LIAB <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$			CX0030H17	1/1/2017	1/1/2018	EACH OCCURRENCE	\$ 10,000,000
							AGGREGATE	\$ 10,000,000
								\$
D	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below		N/A	DTE-UB-2F05102-9-17	1/1/2017	1/1/2018	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER	\$ 500,000
							E.L. EACH ACCIDENT	\$ 500,000
							E.L. DISEASE - EA EMPLOYEE	\$ 500,000
							E.L. DISEASE - POLICY LIMIT	\$ 500,000

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

<b>CERTIFICATE HOLDER</b>  Evidence of Insurance ., IA .	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.  AUTHORIZED REPRESENTATIVE 
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EMR FOR WORKERS COMPENSATION PROGRAM



**James Kraker**  
**Willis of Minnesota, Inc**  
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 james.kraker@willistowerswatson.com

November 23, 2016

Carl A. Nelson & Company  
 1815 Des Moines Avenue  
 Burlington, IA 52601

**Carl A. Nelson & Company**  
**Verification of Mod Rate**

<b>Date Final Mod Issued</b>	<b>Mod Effective Date</b>	<b>Experience Mod Rate</b>
10/18/2016	01/01/2017 to 01/01/2018	.79
10/19/2015	01/01/2016 to 1/1/2017	.82
10/14/2014	01/01/2015 to 1/1/2016	.66
11/07/2013	01/01/2014 to 1/1/2015	.85
11/21/2012	01/01/2013 to 1/1/2014	.93
12/21/2011	01/01/2012 to 1/1/2013	.91

The past modifiers may differ from prior history documentation due to revisions promulgated by the NCCI due to various acquisitions and divestitures.

Sincerely,

*James Kraker*

*Sent Electronically*

James Kraker, Vice President  
 Willis of Minnesota





In 2017, Carl A. Nelson & Company (Company) filed a complaint to foreclose on a mechanics lien filed due to failure of the Prime Contractor to make payments to the Company per the subcontract provisions.

The project Owner and Prime Contractor are in a dispute unrelated to Company's work.

## SECTION 9.0 SAFETY PROGRAM



**We recently achieved 1,500,000 man hours without a lost day accident!**

**In addition, we have achieved 1,000,000 man hours without a lost day accident for the second time in the past 10 years!**

**We are the only contractor in the State of Iowa known to achieve this milestone.**

**DESCRIBE YOUR SAFETY PROGRAM AND HOW IT WILL IMPACT THE WORK OF THE PRIME CONTRACTORS.**

**HOW WILL YOU IMPLEMENT A SAFETY PROGRAM WITH THE PRIME CONTRACTORS?**

The safety organization and years of experience at Carl A. Nelson & Company is the key to implementing our successful safety programs. Our Corporate Safety Director establishes specific project safety goals and objectives and coordinates the safety and health effort at each site. Additionally, he will provide professional safety consultation and technical support services for you, on-site contractors, and our Project Team. Carl A. Nelson & Company's site management monitors and assesses day-to-day activities and verifies appropriate controls are implemented to eliminate or control identified hazards.

We are proud of our safety record and know that a safe work site equates to direct savings for the Owner.

**WHAT SPECIFIC SAFETY POLICIES WILL YOU REQUIRE THE PRIME CONTRACTORS TO MEET?**

Carl A. Nelson & Company will implement a site safety policy that each Prime Contractor will be required to adhere to on the project site. At a minimum, the contractors will have to meet all OSHA requirements for their work. In addition, we will require hardhats, safety glasses, appropriate attire and leather work boots. Some activities may require additional safety equipment or clothing. Consistent safety inspections and discussions will help each Prime Contractor to keep their focus on a work safe environment.

Carl A. Nelson & Company is committed to a program that ensures a safe working environment for every employee and trade contractor, prevents the loss of property, and conserves material/financial resources. Our positive attitude and diligent attention to safety at all levels of management make an important difference in the successful completion of assigned projects.

The success of our safety program is a result of dynamic leadership, many years of experience of our field employees and the long term relationships with subcontractors who share our commitment to safety excellence. Our corporate safety director establishes specific project safety goals and objectives and coordinates the safety and health effort at each site. Additionally, he provides professional safety consultation and technical support services for you, on-site contractors, and our Project Team. Carl A. Nelson & Company's on site management monitors and assesses day-to-day activities and verifies appropriate controls are implemented to eliminate or control identified hazards.

Our safety program works.

This fee proposal is divided into the Pre-Construction and Construction Phases of the project and is based on a mutually agreed to contract.

**PRE-CONSTRUCTION**

We propose a lump sum fee for Pre-Construction Services in the amount of \$50,000.00.

We would bill for this service on a monthly basis. The Pre-Construction Services end when the Drawings and Specifications are ready to bid by the trade contractors.

**CONSTRUCTION**

During the Construction Phase our compensation would be a percentage (Construction Management Fee) of the Construction Cost. The Construction Cost is defined as the sum of the contracts with the trade contractors and suppliers including change orders and the cost of General Conditions incurred by the Construction Manager. General Conditions include Direct Personnel Expenses, Reimbursable Expenses, and the cost of all materials and equipment used on the job site in providing Basic Services as described in the contract.

We propose a Construction Management Fee of 3.5%.

The following shall be considered as Reimbursable Expenses with regard to Pre-Construction and Construction Phase services.

- Direct Personnel Expense per the adjacent rate schedule for management, estimating, and supervision.
- Third party consultant costs, if any.
- Travel costs at the current IRS mileage rate for management personnel.
- The Superintendent’s vehicle shall be paid at the rental rate of \$46/day when the Superintendent is on site. This rate shall include maintenance, tires, and other costs of operation except fuel which will be billed as a reimbursable expense.
- Premiums for liability insurance not related to labor, which is general, umbrella, excess umbrella, professional, and pollution liability. The cost for these premiums shall be 0.59% of the total and final Cost of the Work.

The following are reimbursable expenses that may be furnished by the Construction Manager during the Construction Phase with the approval of the Owner:

- Field office trailer or rental office space including furnishings and equipment
- Job site Copier/Facsimile/Telephone Service
- Project Signage
- Postage/Express Mail/Freight
- Job site Office Supplies
- Documents Reproduction
- Permits/Fees
- Special Insurance Beyond That Normally Carried by Construction Manager
- Sanitation
- Dumpsters
- Construction Electrical Power/Water
- Drinking Water
- Fencing/Temporary Fencing
- Professional Cleaning (Final)
- Safety Materials/Interim Life Safety Measure
- Hoisting (Crane)
- Fire Protection/Extinguishers
- Job Site Security
- Job Site Lighting
- Job Site Toilets
- Layout Engineering/Surveying
- Material/Soil Testing
- Directional Signs/Barricades
- Traffic Regulation
- Snow Removal
- Job Site Photos
- Communication Devices
- Temporary Enclosures/Weather Enclosures
- Temporary Staging Areas
- Any other work as agreed to by the Owner and Construction Manager

<b>Direct Personnel Expense</b>	<b>Regular</b>	<b>Overtime</b>
Project Executive	\$130.00	\$130.00
Project Manager/Chief Estimator	\$100.00	\$100.00
Cost Estimator	\$63.59	\$63.59
Superintendent	\$87.49	\$87.49
Field Engineer	\$63.59	\$63.59

These rates include wages, labor overhead, payroll taxes, insurance, and fringe benefits. The above rates are effective through July 2, 2017. On and after that date the rates shall be annually adjusted. These rates do not include subsistence or living expenses if applicable.





**Mid-Prairie Community School District**

*We Care . . . Excellence Together*  
[www.mid-prairie.k12.ia.us](http://www.mid-prairie.k12.ia.us)

January 31, 2014

Dear Reader,

The Mid-Prairie School District is in the middle of a construction program made possible by the recent successful passage of a 10.6 million dollar bond referendum. Additions to four of five district schools and a new building to house the alternative high school and district central offices are being planned and built.

After having successfully used construction management services for a 5.5 million dollar high school geothermal HVAC system retrofit four years ago, the School Board was a strong proponent of using one again. After the passage of the last bond issue, two construction management firms were interviewed: the firm providing management services for the high school geothermal project and Carl A. Nelson & Company of Burlington, IA. After the interviews, Carl A. Nelson & Company was the unanimous choice of the selection committee members.

To date, the middle school project has been designed and let out for bids. The two elementary additions are in final design and development phase and work will begin soon on the schematic designs for the Senior High School addition and the new building. Carl A Nelson & Company representatives have been critical and valuable members of the process so far.

I can't speak more highly of Carl A. Nelson & Company's involvement. Their professionalism is of the highest caliber. Their unique perspective has added value to our projects and allowed the district to get "more bang for its bucks." Communication has been outstanding and I am continually amazed at the common sense approach they bring to the table. They have gained the respect of everyone involved in the projects: board members, teachers, administrators, architects, engineers, etc. Their extensive work at calculating construction costs and their subsequent suggestions has allowed higher quality improvements to be made while keeping the projects within budget.

I am impressed with Carl A. Nelson & Company. I speak with extreme confidence when I state that as a construction manager their highest priority is the district's best interests. Without any reservations, they are worthy of my highest recommendation.

Yours in service,

Mark Schneider, Superintendent  
[mschneider@mphawks.org](mailto:mschneider@mphawks.org)

**Central Office**

P.O. Box 150  
 Wellman, IA 52356-0150  
 Phone (319) 646-6093  
 Fax (319) 646-2093

**Senior High**

P.O. Box 150  
 Wellman, IA 52356-0150  
 Phone (319) 646-6091  
 Fax (319) 646-6097

**Middle School**

713 F Avenue  
 Kalona, IA 52247  
 Phone (319) 656-2241  
 Fax (319) 656-2207

**Kalona Elementary**

702 6th Street  
 Kalona, IA 52247  
 Phone (319) 656-2243  
 Fax (319) 656-2238

**Washington Township Elementary**

1592 Angle Road SW  
 Kalona, IA 52247  
 Phone (319) 683-2770  
 Fax (319) 683-2284

**Wellman Elementary**

P.O. Box H  
 Wellman, IA 52356  
 Phone (319) 646-2984  
 Fax (319) 646-2987

**West Campus**

P.O. Box 150  
 Wellman, IA 52356-0150  
 Phone (319) 646-6096  
 Fax (319) 646-2093

**Transportation Office**

P.O. Box 150  
 Wellman, IA 52356-0150  
 Phone (319) 646-6881  
 Fax (319) 646-2093



Central Office: 641-472-2655  
Transportation Office 641-472-5252  
Fairfield High School: 641-472-2059  
Fairfield Middle School: 641-472-5019  
Pence Elementary: 641-472-2957  
Washington Elementary: 641-472-2110  
Libertyville Elementary: 641-693-3971

December 31, 2014

To Whom It May Concern:

Fairfield Community School District is currently seven months into a 12+ million dollar high school renovation/remodel construction project using Carl A. Nelson Company as the school district's construction manager.

To this point, within a scheduled 15 month project, Carl A. Nelson Company has provided guidance and sound management of our district's project. This is demonstrated by the following:

- A very tight schedule has been kept, even with some adverse weather conditions.
- Management of 10 bid packages has been sound, monitoring contractor progress, budgets, and change orders.
- On-site staffing has maintained diligent control of construction progress, RFI and submittal processing, site scheduling, site safety and cleanliness.
- Weekly construction meetings are organized and concise, having contractors at the table to discuss business as needed, providing coordination among the trades to keep the project moving.
- Monthly owner/contractor/architect meetings occur to provide overall project coordination, schedule review and site inspection.
- Our project manager, Jay Perry, has provided guidance to the district administration in the areas of construction techniques, budgeting and necessary change orders. His focus is to provide a professional service to the district and to keep the district's board of directors informed as to how the project is progressing.

From our experiences to this phase in our project, it is without hesitation to recommend Carl A. Nelson Company as a construction management firm for a school district project.

Best regards,

A handwritten signature in cursive script that reads "Fred McElwee".

Fred McElwee  
Director of Auxiliary Services  
Fairfield Community School District  
ACT Center  
403 S. 20th Street  
Fairfield, IA 52556  
641.472.5252 (o)  
641.919.5252 (c)  
641.472.2271 (f)

Superintendent Dr. Laurie Noll, Business Manager Kimberly Sheets, Curriculum Director Marci Dunlap, Technology Director John Grunwald, Director of Auxiliary Services, Fred McElwee, High School Principal Aaron Becker, High School AP Brian Stone, Activities Director Jeff Courtright, Middle School Principal Laura Atwood, Middle School AP Matt Jones, Washington and Libertyville Elementary Principal Jeff Eeling, Pence Elementary Principal Chuck Bengel



Dr. Mike L. Jorgensen  
Superintendent Washington CSD  
PO Box 926  
Washington, Iowa 52353  
January 6, 2014

To Whom It May Concern:

I am writing this letter on behalf of Carl A Nelson Construction Management. We have had a relationship with Carl A Nelson on a number of projects over the last 5 years including a \$15 million construction of a new high school. I would recommend the services of Carl A Nelson without hesitation.

Ironically, at the same time that we were completing the new high school project with the assistance of Carl A Nelson, we were also completing a renovation of an elementary building without a construction manager. It was amazing to compare how smoothly the new high school project went in comparison to the elementary renovation. I give much of that credit to the services provided by Carl A Nelson. I would never consider another construction project without the services of Carl A. Nelson.

The consultants with Carl A Nelson were always responsive to any request that we had. They were advocates for the district and their follow-up and follow through was amazing. The communication was very good and they were very attentive to all details of the project. They also have been available for all follow-up questions and investigations related to warranties and punch list items.

We have done two other minor projects since the completion of the high school and Carl A Nelson was hired to manage those projects as well. We are also looking at the addition of an auditorium to our high school and Carl A Nelson has been contracted to serve as construction managers for that project as well.

Carl A. Nelson has an outstanding reputation in the community of Washington as they were also consultants for a new public library and work on the Washington County Hospital projects as well.

I strongly recommend Carl A Nelson for any construction project that you may be considering. I would not consider a project without them.

Sincerely,



Dr. Mike L. Jorgensen  
319-653-6543





**FORT MADISON COMMUNITY SCHOOL DISTRICT**

P.O. BOX 1423, 1930 AVENUE M  
FORT MADISON, IOWA 52627  
(319) 372-7252

GREG SMITH  
STUDENT SERVICES

KENNETH MARANG, Ph.D.  
SUPERINTENDENT

VALERIE SCHMIDT  
SPECIAL EDUCATION

KEVIN MOON  
OPERATIONS/MAINTENANCE

SANDRA ELMORE  
BOARD SECRETARY

STEVE CARLE  
TRANSPORTATION

To Whom it may Concern:

Carl Nelson Company was selected as the General Contractor on a building addition project at the Fort Madison Community School District Senior High site in the spring of 2004.

The scope of this project added nearly 16,000 square feet of space to our Senior High School. The difficulty of this project required the addition to be attached to three existing heavily used wings of the building. Adding to the complexity, construction was required during the school year creating a situation where separation of construction activities from educational activities was vitally important.

Project communication with all district personnel during the entire construction process was exceptional. Building administrators were always kept in the communication loop to prevent any potential problems.

Workmanship and professionalism was also excellent on this project. Taxpayers of the Fort Madison Community School District can be proud of this new addition to our district.

I would not hesitate to recommend Carl Nelson Company for any of your projects.

Kevin Moon

A handwritten signature in black ink that reads "Kevin Moon".

Director of Operations  
Fort Madison Community School District

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"Come Learn And Grow"