



# **Lincoln County CM at Risk Services for Historic Courthouse Redevelopment**

RFP #2023-1117

Due: November 17, 2023

Building Leaders Who Build Communities



## Construction

November 17, 2023

Lincoln County Manager's Office  
C/O John Henry, Purchasing Agent  
353 N. Generals Blvd. (Courier)  
Lincolnton, NC 28092

### **RE: CM at Risk Services for Historic Courthouse Redevelopment; RFP Number #2023-1117**

Dear Members of the Selection Committee,

We share Lincoln County's excitement in revitalizing the Lincoln County Historic Courthouse and solidifying the building as a highly valued cultural resource and revered monument. With opportunities to highlight the courthouse's historic relevance, contribute to the City of Lincolnton's downtown central business district, and enhance the space for future community events, we understand the significance of this project and the positive impact it will have on the local community for decades to come. The following are the key reasons we believe J.M. Cope is the ideal CMAR partner for the Lincoln County Courthouse revitalization project:

**Extensive Experience Redeveloping Historical Buildings:** Revitalizing historic buildings and maintaining their architectural integrity requires a unique project skillset. Having recently completed historic renovations of the Lowenstein Building at University Center in Knowledge Park, Rock Hill, SC and the City of Monroe Theatre, J.M. Cope is eager to offer our expertise as your CMAR partner. We are well versed in redeveloping historical structures that honor their rich history while upfitting them to adapt and thrive in changing economic times. We also have deep knowledge of meeting State Historic Preservation Office (SHPO) standards and preserving relevant memorials and monuments.

**A Company Approach Centered Around Collaboration and Best Value:** At J.M. Cope, we believe in building strong partnerships through collaboration, teamwork, and trust. We work tirelessly to understand you, your goals, and your priorities. Our approach perfectly aligns with the CMAR delivery method, emphasizing early engagement and constructability during the design phase. Our preconstruction team and their focus on constructability during the design phase help deliver a successful GMP without sacrificing programming. This approach allows us to deliver a guaranteed maximum price (GMP) without compromising project programming.

**A Team with Extensive CMAR and Lincoln County Expertise:** Our team members are experts at CMAR projects, with an approach centered around collaboration and best value. With me as your Project Executive and Coleman Clark as Project Manager, we bring recent Lincoln County expertise to bolster our firm's extensive CMAR background and established best practices for similar facilities allowing us to deliver high quality results, minimize risks and costs, and produce deliverables on or ahead of schedule.

Thank you for your consideration of the J.M. Cope team. We look forward to the opportunity to meet with you and build a relationship with Lincoln County. If you have any questions about our expertise or approach, please do not hesitate to contact me at 704.917.9755. ***Our proposal shall remain valid for no less than 90 calendar days from the date of submittal. I'll be accessible to you now and throughout the project.***

Respectfully,  
**J.M. Cope, Inc.**

A handwritten signature in black ink, appearing to read 'Chad Webb'.

Chad Webb, Vice President (*Authorized to Contractually Bind*)

**J.M. Cope, Inc.**  
199 S Cherry Rd,  
Rock Hill, SC 29730  
803.329.3250

**Main Point of Contact:**  
Chad Webb, Vice President,  
Charlotte Division  
199 S Cherry Rd, Rock Hill,  
SC 29730  
Mobile: 704.917.9755



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## SECTION ONE

# FIRM'S STATEMENT OF QUALIFICATIONS AND AVAILABILITY TO UNDERTAKE THE PROJECT



**Driven by a desire to help improve our communities and build leaders, J.M. Cope team members focus on honesty, collaboration, and a strong work ethic, incorporating safety and sustainability into our decision-making processes at every level.**



# STATEMENT OF INTEREST

With J.M. Cope, your Lincoln County Historic Courthouse Redevelopment project will receive the critical experience of team members well-versed on different scales of historic municipal projects. Sharing a similar philosophy focused on integrity, professionalism, honesty, and exceeding client expectations, our mission is to provide operational excellence and customer satisfaction while delivering an exceptional project everyone is proud to have been a part of. Below are a few key reasons we feel confident J.M. Cope should be selected as your CMAR.



## Extensive CMAR Experience on Historic Construction Projects

Our team is highly skilled in managing historic projects in all stages of construction, ensuring the needs of stakeholders and public interests are met while balancing budget constraints and navigating tight schedules. We understand how to update historically relevant buildings, working around unforeseen conditions, while maintaining the architectural integrity. We prioritize safety above all else, and have **a proven track record of keeping our team members safe while delivering top-quality results.**

## A Leadership Team with Experience on the Lincoln County Courthouse

J.M. Cope's executive in charge, Chad Webb took part in the construction of the new Lincoln County Courthouse. This project included a 104,000 SF, 4-story courthouse featuring classical architecture and modern technology. Chad's extensive background and knowledge of Lincoln County projects brings the expertise and understanding needed for this redevelopment.

## A Company Culture Centered Around Collaboration and Cooperation

J.M. Cope is intimately familiar with CMAR delivery, from preconstruction through close-out. With a long list of satisfied government and institutional clients, we have successfully delivered some of the most complex projects in the Carolinas. **We believe in working collaboratively with our clients and stakeholders.** We listen carefully, provide and consider all relevant input openly, and act fairly with the welfare of the team and project in mind.

## Local and Regional Relationships Built on Trust and Respect

As one of the largest and most respected contractors in the Carolinas, J.M. Cope has developed deep local and regional relationships over the last 40+ years with third-party inspectors, subcontractors and suppliers, as well as with the labor market. These deep roots in the community have benefited clients in a myriad of ways, including smoother permitting, excellent subcontractor relationships, community engagement, and fundraising. As a local expert, J.M. Cope has vast experience in the southeast region and familiarity with state laws, ordinances, and applicable codes. **This local focus helps to build relationships of trust and respect with clients and deliver the quality of service everyone can take pride in.**

## Client Service at the Heart of Everything We Do

No matter the construction service we provide, or the delivery method under which we provide it, our approach to client service is the same – we work to truly know and understand our clients, their goals, and their priorities and we make those goals our own. **To measure our success in achieving this goal, we use five basic metrics: zero incidents, zero rework, on time delivery, at or below budget, exceeding customer expectations.**

## FIRM OVERVIEW AND HISTORY

Andrew Cope (CEO) and father,  
Marty Cope (Founder)



*"We want to be a light in the community, and we do that by building quality projects that help our communities grow."*

Andrew Cope, CEO

## FIRM INTRODUCTION

### J.M. COPE - YOUR PARTNER IN CONSTRUCTION

J.M. Cope has been building and improving southeastern facilities for 40 years. We focus on projects within a 90-mile radius of our offices to ensure we can deliver on our customer service from all levels, and bring detailed knowledge of the local subcontractor market.

**At J.M. Cope, we seek to improve our community through the value and quality of the projects we build.** As a trusted advisor, we offer our clients a variety of construction delivery method services, but no matter the services we provide or contract method under which we provide them, our approach to client service is the same – we work to truly know and understand our clients, their goals, and their priorities. We make those goals our own.

We enjoy our work the most when it can be done in an environment of cooperation, collaboration, and trust, so on every project, our goal is to create those ideal conditions starting with our own actions. Through open and honest communication, and a culture of integrity and fairness, we seek to build relationships that lead to success.

**J.M. Cope is one of the region's most well-respected construction firms.**

### Charlotte Business Journal Award Recipient

- 2020, 2021 and 2022 Best Contractor Awards
- 2022 40 Under 40 Honoree- Wes Drummond
- 2022 Best Places to Work in South Carolina- Best Companies Group
- 2019 and 2021 Charlotte's Largest General Contractor
- 2017, 2018, 2019, and 2022 Best Places to Work
- 2019 Middle Market Leader
- 2018 Middle Market Leader

## AVAILABILITY AND COMMITMENT

J.M. Cope has the depth, experience and local horsepower to lead this contract. We plan well in advance, assembling a highly skilled team of field staff to ensure the flawless execution of our top-quality projects.

Because of our highly skilled workforce, J.M. Cope has a successful track record of managing our team and staff availability to meet project and schedule needs. Our team at J.M. Cope is fully committed and available to undertake the Lincoln County Courthouse redevelopment project. Our principals and proposed team members are passionate about community-focused construction and will actively manage and oversee the project. We prioritize open communication and resource allocation to meet critical project milestones. Our commitment extends beyond project completion, as we aim to build a lasting relationship with Lincoln County.

## SECTION TWO

# ABILITY TO PROVIDE CONSTRUCTION MANAGEMENT SERVICES



**"I further believe that any entity considering such approaches will find the J.M. Cope Construction team a professional, knowledgeable, and fair partner in completing any construction project. They are a well-rounded professional team player."**

*Mark Kettlewell, PE, PLS  
County Engineer, York County Government*



**For over four decades, J.M. Cope has grown our roots in the Carolinas. As one of the most financially sound contractors in the region, we bring a \$125 million bonding program and a stellar reputation. We are a stable partner you can count on, now and into the future.**

Volume: Annual Number, Value, and Percent Change of Contracts for the Past Five Years				Revenues: Annual revenue totals and percent change per year			Present Bonding Capacity (Total/Remaining): \$25M / \$56.5M	
							Present Bond Rate	
Year	Number of Projects Per Year	Value	% Change	Year	Revenue Total	% Change	First \$100K	\$14.40 / \$1000
2022	15	\$118.3M	29.57%	2022	\$117M	64.79%	Next \$400K	\$14.4 / \$1000
2021	28	\$91.3M	63.04%	2021	\$71M	20.3%	Next \$2M	\$8.70 / \$1000
2020	5	\$56M	26.32%	2020	\$59M	-22.4%	Next \$2.5M	\$6.90 / \$1000
2019	19	\$76M	8.57%	2019	\$76M	28.8%	Next \$2.5M	\$6.30 / \$1000
2018	14	\$70M	63.7%	2018	\$59M	.9%	Over \$7.5M	\$5.76 / \$1000

*Please see following letter for total bonding capacity, available bonding capacity, and current backlog.*



November 15, 2023

Lincoln County Manager's Office  
C/O John Henry, Purchasing Agent  
353 N. Generals Blvd  
Lincolnton, NC 28092

Re: JM Cope, Inc. – Response to RFQ No. 2023-1117 – Historic Courthouse Redevelopment

To Whom It May Concern:

Please be advised that Munich Re handles all the bonding requirements for JM Cope, Inc. We are a strong supporter of JM Cope, Inc.'s surety program. They currently have a single project limit of \$40,000,000 and an aggregate program of \$125,000,000. Current available capacity is \$56,500,000, and backlog is \$68,500,000. They maintain a solid financial base and their staff has excellent character, management skills, and construction expertise. In our experience, they have always handled their obligations in a professional manner.

JM Cope, Inc. can provide Performance and Payment Bonds for this project should they be selected. Naturally, as is customary within the surety industry, the issuance of any bid or final bonds is always contingent upon a satisfactory underwriting review at the time a request for bonds is made. This review may include, but not be limited to, acceptable terms, conditions, documents, bond forms, and confirmation of an acceptable financing source and payment provisions. Any arrangement for surety bonds is a matter strictly between JM Cope, Inc. and Munich Re. We assume no liability to third parties or to you by issuance of this letter. We acknowledge that JM Cope may be bonded for each stage/phase of the project, with potential maximum construction cost of \$3.68 million.

American Alternative Insurance Corporation and Munich Reinsurance America, Inc. (Munich Re) are listed in the Department of Treasury's Listing of Approved Sureties (Department Circular 570) and hold an A+ (Superior) rating by A.M. Best with a Financial Size Category XV by A.M. Best.

Please do not hesitate to contact me if there are any questions or if I may be of further assistance.

Sincerely,

A handwritten signature in black ink, appearing to read 'Alexander Galloway'.

Alexander Galloway  
President  
Peoples First Insurance

P F I

466 Hood Center Dr., Rock Hill, SC 29730 (PO Box 66, 29731)  
Ph: 803-324-5262 Fax: 803-329-5301  
[www.peoplesfirstinsurance.com](http://www.peoplesfirstinsurance.com)

## SECTION THREE

# QUALIFICATIONS OF CONSTRUCTION MANAGER AT RISK TEAM



**We are CMAR experts. Our collaborative and open-book approach allows us to benefit clients in every phase of development. We will be your partner to ensure your project is a success.**



## QUALIFICATIONS OF CMAR TEAM

### Management Philosophy

We approach each project as a partnership and seek universal success for everyone involved —from clients to design partners to subcontractors. Each member of the project team offers different skills and knowledge that when functioning together create a superior project for all parties involved. We have extensive experience coordinating complex projects with multiple stakeholders- including developers, city officials, and design team members.

As your construction partner, we want to give the entire project team access to the project status at all times. We utilize the latest in construction reporting tools to ensure you always have visibility to the project budget and schedule. Through weekly and monthly job meetings and hands-on monitoring of critical items, we take a proactive approach to securing early subcontractor buy-in and strictly adhering to the budget and schedule.

### Design Support and Collaboration

From the onset of any project, our best practice is to proactively team with the project's designer of record and the design consultants to provide viable solutions to a project's unique challenges. Our team's extensive experience on historic building projects allows us to share



Our extensive preconstruction expertise, historical market data, and local knowledge of the subcontractor base helps ensure our preliminary budget is accurate.

our specialized insight from the construction side of the equation to reach the quality we promise to deliver. Whether it is proposing alternative phasing or scheduling logistics to achieve favorable sequencing of material installation, or to clarify intersecting details of materials and systems, when these areas are explored and incorporated during design and planning, higher quality is achieved.

**This approach of heavy emphasis during preconstruction allows us to deliver a guaranteed maximum price (GMP) without compromising project programming.**

## CM AT RISK EXPERTS AT A COST THAT MAKES SENSE

Our team has completed a multitude of CMAR or best value projects in the Carolinas. This transparent methodology compliments the J.M. Cope culture of providing best value for our clients. One of the benefits of the CMAR delivery method is the collaborative and open-book approach. From the beginning, J.M. Cope becomes a collaborative member of the project team. For example, in preconstruction, our team assists with budgeting, cost estimating, and scheduling, and provides design recommendations and value engineering options.

Additionally, the CMAR process allows our team to conduct a thorough subcontractor recruitment and prequalification effort, which ensures participation by top quality firms with local and minority representation.



From our extensive CMAR experience, J.M. Cope brings value to your projects as a low cost CMAR provider.

## THE CMAR PROCESS

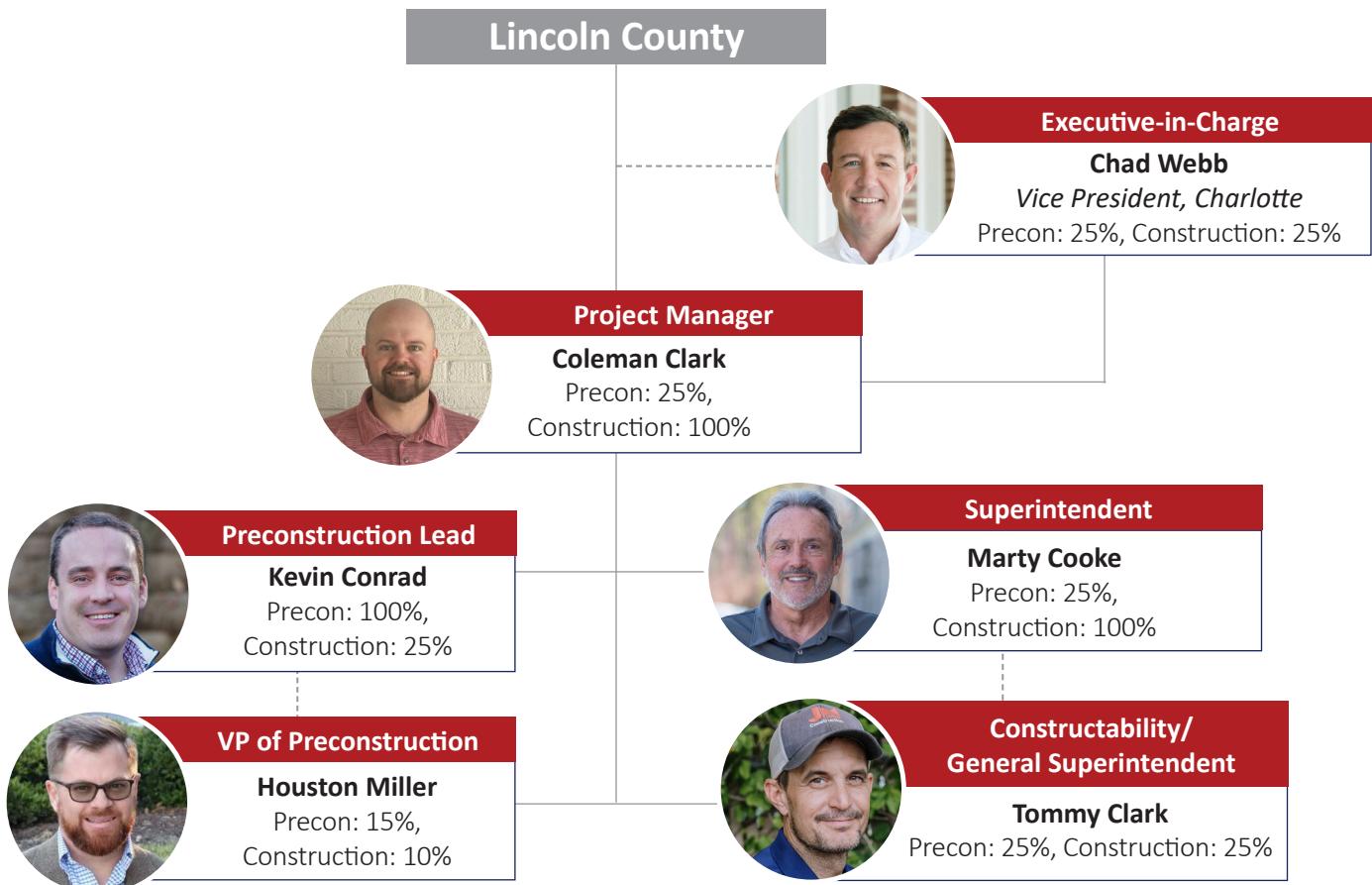
Planning	Select Architect/ Design Firm	Conceptual Drawings	Schematic & Design Development	Final Drawings	Construction	Time Savings
	Select CM	Cost Modeling	Control Estimates	GMP Established		

— Establish Anticipated GMP

## QUALIFICATIONS OF CMAR TEAM

We have hand-selected our proposed project team based on their successful history of working on historical and municipal projects for clients, including Lincoln County.

Our team's collaborative approach and solutions-focused mindset sets them apart from other industry veterans. They are well versed in the complexities that can occur when a historic building is being revitalized and renovated to meet new industry standards and for future use. They prioritize making timely and decisive decisions to ensure project success. With strong working relationships and experience working together on numerous projects, our team is well-equipped to deliver top-quality results to Lincoln County.



Team Member	Total Years Experience	Lincoln County Experience	Historical and Municipal Expertise	Involvement in Projects in Section 4 & Responsibility Compared
Chad Webb, Executive-in-Charge	25	✓	✓	N/A
Coleman Clark, Project Manager	6	✓	✓	N/A
Marty Cooke, Lead Superintendent	42		✓	✓ - Same Role
Tommy Clark, Constructability / General Superintendent	24		✓	✓ - Same Role
Houston Miller, VP of Preconstruction	22		✓	✓ - Same Role
Kevin Conrad, Preconstruction Lead	22		✓	✓ - Same Role

# CHAD WEBB

## EXECUTIVE-IN-CHARGE

### About

As a seasoned Project Executive, Chad brings over 25 years of invaluable experience in business intelligence and operations management, with a specific focus on municipal projects that align perfectly with the goals of Lincoln County. He consistently excels in delivering projects ranging \$3M to \$100M in value, showcasing his capacity to manage projects of varying scale and complexity.



**YEARS WITH J.M. COPE:** 1



**CITY OF RESIDENCE**

Denver, NC



**EDUCATION/CERTIFICATION**

East Carolina University, BS - Construction Management, 2003



**YEARS OF EXPERIENCE:** 25

Chad's competencies encompass leadership and people development, risk management, contract negotiations, and strategic planning, all of which are crucial for the success of the Lincoln County Courthouse redevelopment. His commitment to excellence is underscored by his active involvement in industry organizations and advisory boards, ensuring he remains at the forefront of market trends and best practices, which will be invaluable for the success of this project. He has cultivated a strong reputation for delivering optimized construction solutions, consistently driving results in a collaborative and inclusive manner.

*\*Experience completed prior to joining J.M. Cope*

### RELEVANT EXPERIENCE

#### **Lincoln County Courthouse\*** Lincolnton, NC | ~ \$32M

Construction of a 104,000 SF, 4-story courthouse featuring classical architecture and modern technology. The courthouse includes 7 courtrooms, Clerk of Court, District Attorney's office, Magistrate's Office, Jury Assembly spaces, District Courts, Superior Courts, Judge's Chambers, and numerous Conference Rooms. It also incorporates holding cells on all floors and advanced security and AV systems.

#### **Lincoln Academy Street & Med Arts Renovations\*** Lincolnton, NC | ~ \$3.7M Combined

A Design-Build project involving approximately 26,500 SF of renovations to two separate buildings: Lincoln Academy Street and Medical Arts. Lincoln Academy Street houses Veteran's Services and Parks and Recreation departments, while Medical Arts accommodates the offices of Juvenile Probation, Public Defender's Office, and the Register of Deeds.

#### **CMPD South Division\*** Charlotte, NC | January 2020 – March 2021 | ~ \$12M

The project involved the construction of a 17,000 SF, 1-story police station and Neighborhood Business Services office in Charlotte, NC. Notable features included ICF exterior walls, geothermal wells, EV charging stations, and LEED Silver certification.

#### **Davidson County Courthouse\*** Lexington, NC | \$28.5M

**Pitt County Courthouse Renovation\*** Greenville, NC | \$10M

**Davidson County Law Enforcement Center\*** Lexington, NC | \$8.8M

**Optimist Hall\*** Charlotte, NC | \$35M

# COLEMAN CLARK

## PROJECT MANAGER



**YEARS WITH J.M. COPE:** 1



**CITY OF RESIDENCE**

Taylorsville, NC



### EDUCATION/CERTIFICATION

Appalachian State University,  
BS - Construction Management,  
2019

OSHA Training — 30 Hour  
Certificate  
Fork Lift Certified



**YEARS OF EXPERIENCE:** 6

## About

As a Project Manager, Coleman thrives in the challenging construction industry, bringing a team-first attitude and strong leadership to ensure project safety, quality control, and profitability. Coleman is committed to building long-term, profitable partnerships with clients, design firms, and trade partners, resulting in repeat projects and mutual success.

Coleman is proficient in construction management software, holds an OSHA 30 certification, and is certified as a forklift operator. Beyond his professional achievements, he actively participates in community service, demonstrating a commitment to giving back to the community.

*\*Experience completed prior to joining J.M. Cope*

## RELEVANT EXPERIENCE

### Lincoln County Courthouse\* Lincolnton, NC | ~ \$32M

Construction of a 104,000 SF, 4-story courthouse featuring classical architecture and modern technology. The courthouse includes 7 courtrooms, Clerk of Court, District Attorney's office, Magistrate's Office, Jury Assembly spaces, District Courts, Superior Courts, Judge's Chambers, and numerous Conference Rooms. It also incorporates holding cells on all floors and advanced security and AV systems.

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# TOMMY CLARK

## CONSTRUCTABILITY | GENERAL SUPERINTENDENT

### About

With a career of nearly 25 years, Tommy is a proactive superintendent who has managed a variety of construction teams and an array of projects across multiple industries including municipal, hospitality, industrial and manufacturing. He is skilled at creating effective communication between clients, subcontractors, management, and design teams. Tommy is consistently involved in all facets of building construction and works efficiently and effectively to complete projects on time and within budget. He astutely manages each client project with a keen eye for value engineering, all the while keeping safety a top priority.



**YEARS WITH J.M. COPE:** 5



**CITY OF RESIDENCE**

Rock Hill, SC



### EDUCATION/CERTIFICATION

OSHA Training — 30 Hour Certificate

First Aid Certified

SC Stormwater Certification

Forklift Certified



**YEARS OF EXPERIENCE:** 25

### RELEVANT EXPERIENCE

**Lowenstein Building at University Center Rock Hill, SC | 220,000 SF | \$23.2M**  
General Superintendent for the 220,000 SF renovation and re-purposing of this five-story structure, formerly the site of Rock Hill Printing & Finishing Company, into office and retail space. Part of the Knowledge Park re-development, a total of \$70M Revenue at ~8%.

**Fort Mill Aquatic Center Fort Mill, SC | 29,416 SF | \$11.3M | 2019**

General Superintendent for the Fort Mill School District's new 29,416 SF aquatic center that features a new, 50-meter stand-alone competition pool with a state-of-the-art evacuation system, an integrated timing system, movable bulkhead, and support facilities. Special attention was given to accommodate the preferences and priorities of the project's three major stakeholders — Fort Mill School District, The Town of Fort Mill, and the Upper Palmetto YMCA.

**Composites One Facility Rock Hill, SC | 100,000 SF | \$8.5M | 2018**

General Superintendent for the new manufacturing and distribution warehouse delivered via CM at Risk. The project scope included the demolition of various existing fixtures and the upgrade of wall types, ceilings, and fixtures to meet H3 standards for corrosive materials. The upfit also included upgrading the 6,000 SF office space and ESFR sprinkler.

**Kingsley 9 Building Shell Fort Mill, SC | \$1.2M | 2021**

General Superintendent for this shell building in Fort Mill. The project included a challenging building structure with many exterior components to coordinate.

**Parking Deck B Rock Hill, SC | \$13.3M | 2022**

General Superintendent for construction of a 5-story, mixed-use parking deck project in Rock Hill. The structure includes ground level retail, a bus station, and 643 parking stalls.



# MARTY COOKE

## SUPERINTENDENT

### About

A seasoned superintendent and native of Rock Hill, Marty earned his considerable construction expertise over the course of 42 years working on multi-million dollar ventures with such entities as HUD and the State Historic Preservation. As the former owner of his own residential construction company, Marty not only appreciates the value of creating and maintaining positive work relationships, but also understands the importance of completing projects on-time and within budget. In fact, his ability to effectively supervise large construction sites and their accompanying crews is so respected, he often is brought in to complete projects in danger of exceeding the budget and timeline.

*\*Experience completed prior to joining J.M. Cope*



**YEARS WITH J.M. COPE:** 6



**CITY OF RESIDENCE**

Rock Hill, SC



**EDUCATION/CERTIFICATION**

University of South Carolina, Accounting, 1972 (Left for military service)

OSHA Training — 10 and 20 Hour Certificates



**YEARS OF EXPERIENCE:** 42

### RELEVANT EXPERIENCE

**Rock Hill Sports and Event Center, Rock Hill, SC | 130,000 SF | \$25.7M | 2019**  
Lead Superintendent for the ground-up construction of the new multi-purpose athletic facility in historic Rock Hill. The project meets State Historic Preservation Office standards and contains basketball courts, concession areas and other sports-related facilities.

**Rock Hill Sports and Event Center Parking Deck, Rock Hill, SC | \$9.75M | 2019**  
Lead Superintendent for the 6-story parking deck located in the heart of Knowledge Park.

**Chester County Natural Gas Headquarters, Chester County, SC | 25,500 SF | \$5.7M | 2018**

Lead Superintendent for the ground-up construction of this 13,500 SF new operations headquarters and 12,000 SF warehouse.

**Lofts at White Furniture\*, Mebane, NC | \$17.9M | 2015**

Lead superintendent for the rehab of 156 units across four stories in the historic White Furniture Company building originally constructed in 1881. The facility features original exposed brick, oversized windows, and pine ceilings combined with modern amenities.

**Jefferson Brookville Apartments\*, Newport News, VA | \$7.8M | 2014**

Superintendent responsible for the new construction and adaptive reuse of 50 units across three stories at the historic George Washington School and former Mesic Hardware building.

**Highland Memorial Apartments\*, Gastonia, NC | \$7.2M | 2013**

Superintendent responsible for the adaptive reuse of the former Gaston Memorial Hospital. The project consisted of converting 75 units into affordable housing for seniors and people with severe disabilities.

# KEVIN CONRAD

## PRECONSTRUCTION LEAD

### About

With 22 years of experience, Kevin has been a project manager and a project estimator in all markets within the construction industry including municipal, hospitality, multi-family, industrial, commercial, retail, faith-based, and K-12. Kevin's responsibilities include estimating, value engineering, scheduling, cost management, and preconstruction development. Kevin's vast experience gives him an extensive understanding of the preconstruction process including value engineering and the required work for projects to maintain their budgets and timelines. Kevin's ability to deliver successful projects on time has established him as a trusted partner with clients and internal teams alike.



**YEARS WITH J.M. COPE:** 3



**CITY OF RESIDENCE**

Matthews, NC



### EDUCATION/CERTIFICATION

New Jersey Institute of Technology, BS - Engineering Technology, Construction Management, 2003



**YEARS OF EXPERIENCE:** 22

### RELEVANT EXPERIENCE

#### Mooresville Operations Center Facility\* Mooresville, NC | \$8.5M | 2010

Project Manager responsible for this Design-Bid project that included site development of six precast wall structures for the Town of Mooresville Operations Center. Most buildings ranged from 8,000 SF to 56,000 SF with one being 150,000 SF. The buildings consisted of an Operations Center with warehouse, equipment shelter, material storage, truck and equipment maintenance, and brine storage.

#### Lifehouse Women's Shelter Renovation Rock Hill, SC | \$800K | 2023

Lead Estimator for this project and responsible for managing the estimating and bidding process for this project. Project consists of a 3,000 SF of renovation and upfit within a 2- story structure. Project includes removal of interior finishes and adding structural foundations and piers within existing 1st floor structure.

#### Chester County Detention Center Additions and Renovations Chester, SC | \$10M | 2012

Project Manager for this project. Additions for the detention facility consisted of a 2-story addition which included 63 steel cells, 12,000 SF addition for admin offices and courtrooms, and 6,000 SF for Sheriff offices. Project had multiple phases, work had to be completed with facility open in all areas and the entire new and existing foot print of the facility received a new metal roof.

#### Charlotte Water Zone 4 Field Operations Center, Charlotte, NC | 63,000 SF | 2023

Senior Project Manager for the construction of a new 63,000 SF field operations center for Charlotte Water Zone 4.

#### Knowledge Park Mixed Use Parking Garage (Garage B), Rock Hill, SC | \$13M | 190,820 SF | 2020

Chief Estimator responsible for managing the estimating and bidding process for this 190,820 SF parking garage project.

# HOUSTON MILLER

## VICE PRESIDENT | PRECONSTRUCTION

### About

A highly skilled estimator with nearly 22 years in the industry, Houston brings unparalleled expertise to projects across a wide-range of markets including municipal, industrial, education, healthcare, multi-family and senior living. When coupled with his ability to visualize the life-cycle of a project, Houston's negotiated and tangible hard-bid experience and clear understanding of site costs and budgeting within the current economy ensures that a project not only meets a client's financial goals and schedule, but often surpasses them. Houston is extremely well-versed in nearly all major scheduling applications and is an advocate for client projects to realize efficiencies through technological enhancements.

### RELEVANT EXPERIENCE

**Rock Hill Sports and Event Center CMAR Rock Hill, SC | 130,000 SF | \$28.9M | 2019**

Chief Estimator for the ground-up construction of the new multi-purpose athletic facility in historic Rock Hill that meets State Historic Preservation Office standards. It contains basketball courts, concessions and other sports-related facilities.

**Elkem Ascent Clean Room & Laboratory Renovations, York, SC | 18,000 SF | \$2.5M | 2020**

Chief Estimator for the renovation of the existing facility to include new plant utilities systems (piping), new power distribution, a Quality Lab, a Digestion Lab, Mix & Pack workshop, Dispersions workshop, White Room staging & storage area, and shipping & finished goods storage. The office, break rooms & locker rooms are being improved with upgrades to finishes and layout, including associated modifications to walls, ceilings, HVAC & electrical.

**Crossroads Industrial, Spartanburg, SC | \$48M | Ongoing**

Chief Estimator for the development of approximately 66 acres along with three spec buildings: Building 1: 168,480 SF; Building 2: 168,480 SF; Building 3: 477,360 SF.

**Marine Drive Speculative Buildings, Rock Hill, SC | \$4.8M | 2021**

Chief Estimator for the construction of two Marine Drive Speculative Buildings in Rock Hill, SC. The project consisted of two buildings which are 20,000 SF and 18,000 SF. Both structures are pre-engineered buildings with structural panel.

**Bobcat Dealership, Rock Hill, SC | \$3M | 2022**

Chief Estimator for a new BobCat dealership in Rock Hill.

**Geo Plastics Warehouse, Charlotte, NC | 25,800 SF | \$4.1M | 2023**

20,000 SF warehouse expansion for additional storage, as well as with 4,000 SF of office space.

## SECTION FOUR

### PAST PERFORMANCE ON REPRESENTATIVE CMR PROJECTS



**“J. M. Cope Construction was not only involved in the construction of the building, but also helped with preliminary budgeting for the project. Additionally, they provided valuable input while we were finalizing our plans for the project in order to meet our budget requirements.”**

| *Rick Thompson  
Operations Manager, Ebara Pumps Americas Corporation*



**J.M. Cope's mission is to build leaders who build communities - and this starts with strong community facilities. This principle guides the way we treat our clients and partners and the quality of work we consistently deliver. With historical upfits and municipal experience in the Carolinas, our team knows how to both build and redevelop quality municipal facilities and be a good partner while doing it.**

### RELEVANT EXPERTISE:

- Arrowpointe Federal Credit Union
- Bank of York- Lake Wylie Branch Renovations
- Bank of York- Liberty Street Renovations
- Carolina First Bank Fort Mill
- Catawba Animal Clinic- Addition
- Chester County Airport T-Hanger
- Chester County Natural Gas Authority Headquarters
- **City of Monroe Historic Theatre Renovation**
- Fairfield County Spec Building
- Chester County Hazmat Facility
- Family Trust Headquarters
- Fort Mill Welcome Center Renovations
- **Historic 1939 Building - Arena Support Space Upfits**
- **Historic 1939 Building - Piedmont Medical Upfit**
- **Historic 1939 Building - Confidential Client Tenant Upfit**
- Lancaster County- DMV Headquarters Renovation
- **Lowenstein Building at University Center in Knowledge Park**
- Moss Justice Center Expansion and Renovation
- Natural Gas Customer Service Center and Compressed Natural Gas Filling Station
- Rock Hill Fire Department- Live Burn Building
- Rock Hill Operations Center
- Rossville Volunteer Fire Department Building
- Rock Hill Sports and Events Center
- South Carolina School for the Deaf
- South Carolina Welcome Center
- Union County Operations Center
- **York County Family Courthouse**
- York County Natural Gas
- York County Natural Gas Headquarters
- York County Natural Gas Headquarters Building- 2nd Floor Upfit
- York County Natural Gas Headquarters Building- HVAC Additions
- York County Prison

### RECENT HISTORICAL RENOVATION EXAMPLE



# THE LOWENSTEIN BUILDING AT UNIVERSITY CENTER

Rock Hill, SC

## KEY FEATURES:

- » **Historical redevelopment** in Rock Hill's downtown core
- » Interior upfits
- » Coordination with Historical Preservation Society
- » **CM at Risk Project**

**Renovation** and **repurposing** of a five-story, 220,000 SF structure, formerly Rock Hill Printing & Finishing Company, into office and retail space. The \$23 million Lowenstein Building project transformed 160,000 SF of space into offices, civic, and retail properties, targeting knowledge economy businesses. The modern, tech-oriented interior **preserves the building's history in the textile economy while showcasing adaptability**. J.M. Cope assisted the client team since 2013, steering the project within budget. The historic building blends past mill history with a forward-looking entrance, innovatively making it energy-efficient while maintaining its original look.

**Construction Cost at Time of GMP:** \$21,827,218

**Final Construction Costs:** \$23,261,318

**Final Project Size:** 220,000 SF

**Type of Construction:** renovation, negotiated general contract

### Preconstruction and Construction Phase Services:

Schematic, Design Development, Estimates, Construction Document Estimates, Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 289

**Number of Calendar Days Added by Change Orders:** 45 (unforeseen existing conditions & permitting delays)

**Name of Project Manager:** Tyler White

**Name of Project Superintendent:** Doug Jolly & Tommy Clark

**Names of Subcontractors:** Overhead Door – ASSA ABLOY Entrance Systems, Micro Pile – Axiom Foundations,

Drywall – Bonitz Contracting Company, Doors, Frames, Hardware, & Toilet Partition – Burgess Sales & Supply, Kalwall System – Carolina Architectural Products, Concrete Restoration – Carolina Restoration & Waterproofing. Building Concrete – Carolina Star Concrete, Demo & Abatement – Clear Site Industrial, Drywall & Metal Stud – Efficient Contractors, Elevator Cab Interior Finish Install – Elevator Cabs & Surfaces, Complete Flooring System – Garmon & Company, Pile Cap Rebar – Harris Rebar, Plumbing – Herlocker Mechanical Systems, Rough & Final Cleaning – International Cleaning & Maintenance, Roofing – Johnson's Roofing Service, Millwork – Knot Yet Cabinet Works, Fire Sprinkler – Metrolina Sprinkler Company, Structural & Miscellaneous Steel – MS Production Solutions, Elevators – Otis Elevator Company, Temporary Power – Qwest Electric, Temporary Shoring – Safway Services, Window Painting – Southern Painting & Maintenance Specialist, Mechanical System – Steele's Heating & Air Conditioning, Glass & Window – Union Glass & Metal

### Reference:

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Tuttle Company, Skip Tuttle, President, 803.366.1158

**Architect/Engineer's Name and Representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** McClure Nicholson Montgomery; Jim Montgomery, 704.332.6763

**Length of Business Relationship with Owner:** 35 Years

**MWBE Goal Approach:** We utilize minority businesses on all of our projects and keep a strong working relationship with qualified MWBE firms.

# HISTORIC MONROE CENTER THEATRE RENOVATIONS AND ADDITION

Monroe, NC



## KEY FEATURES:

- » *Historical Renovation and Addition*
- » Tight Site Conditions

Designed in the late 1930's by renowned Hendersonville, NC architect, Earle G. Stillwell, the City of Monroe's Center Theatre is now primed to be what it once was — a vibrant hub for the city and surrounding areas — thanks to the combined efforts of community leaders, volunteers and the Center Development Group. J.M. Cope acted as general contractor for the Theatre's renovation and addition; during which our team encountered and successfully addressed multiple challenges — many common to historic projects such as this. One such challenge revolved around the Theatre's location. As with many historic commercial buildings, the Center Theatre features tight site conditions, as the city has expanded since the Theatre was first constructed. As part of the project scope, J.M. Cope was able to stabilize the building by installing shoring throughout the structure, removing load bearing walls and replacing with steel components, and then removing the shoring. All stairways within the building were rebuilt.

**Construction Cost at Time of GMP:** \$5.6M

**Final Construction Costs:** \$5.9M (site conditions and owner-requested changes)

**Final Project Size:** 20,000 SF

**Type of Construction:** Renovation and Addition

### Preconstruction and Construction Phase

**Services:** Schematic, Design Development, Estimates, Construction Document Estimates, Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training, Performance Arts Seating, Audio/Visual Equipment, Stage Lighting, Mixing Booth, Required Curtains, Miscellaneous Steel Systems (to support all necessary equipment)

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 379

**Number of Calendar Days Added by Change Orders:** 122  
(site conditions of building and owner-requested changes)

**Name of Project Manager:** Steve Thompson

**Name of Project Superintendent:** Chris Cone

**Names of Subcontractors:** A-1 Glass & Aluminum, Advanced Concrete Cutting & Coring, AOA Signs Inc., Aqua Source, Atlantic Concrete Services, Axiom Foundations, Bonitz Inc, Carolina Floors, Carolina Grading Service, Cedar Rock Environmental, Charleston Concrete Design, CM Steel, Cochrane Steel, Cook and Boardman, David Allen Company, Dean Rowell Grading & Utilities, Draw Enterprises, Efficient Contractors, FESS Fire Protection, Greenfrog, Hawkins Plastering, Knot Yet Cabinet Works, KrazMetals, Lawrence & Associates, Lucas Concrete Products, Lysaght Associates, M & J Electric, Maximum Fire & Security, McCollum Trucking & Grading, McGee Brothers, NationServe of Charlotte, New South Specialties, Performance Acoustics, Productions Unlimited, Royalwood Associates, SanHer Stucco & Lather, Scaffolding Solutions, Seedspark, Sigma Engineered Solutions, Sistare Carpets, Steele's Mechanical, Strategic Connections, Tecta America Roofing, Tino Tile & Marble, Unit Paving, USA Waterproofing

### Reference:

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Brian Borne, City Manager (Former), 704-292-1705 Ext 6040

**Architect/Engineer's name and representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** Clearscapes Architect, Fred Belledin, AIA – 919.821.2775

**Length of Business Relationship with Owner:** 5 Years

**MWBE Goal Approach:** We utilize minority businesses on all of our projects and keep a strong working relationship with qualified MWBE firms.

# HISTORIC 1939 BUILDING - ARENA SUPPORT SPACE UPFITS

Rock Hill, SC

## KEY FEATURES:

- » *Historical redevelopment*
- » Tight Site Conditions
- » Marty Cooke worked on this project

This project was a 31,000 SF historical renovation to provide support space for the adjoining Rock Hill Sports & Event Center sports complex. Construction consisted of new gang bathrooms, staff support areas, concessions, exterior canopies, gutters, and roofing, coaches lounge, 8,000 SF team room, two stop elevator, new stairs, and all new MEP FP. Shoring throughout the space was required to cut in new openings into load bearing brick walls.

Existing roofing was made of heavy timbers that were to remain. Any damaged timbers found had to be replaced with like materials. J.M. Cope salvaged existing timbers and doors that had to be removed for owner's use. J.M. Cope also cleaned and repaired the exterior brick façade to remove paint and tuck point mortar, all while maintaining the historical characteristics of the brick.

Construction activities were ongoing in an occupied building. Coordination with existing tenants was essential to a successful project delivery.

**Construction Cost at Time of GMP:** \$2,754,607

**Final Construction Costs:** \$2,950,533

**Final Project Size:** 31,000 SF

**Type of Construction:** Renovation

**Preconstruction and Construction Phase Services:** General Construction, Mechanical, Plumbing, Fire Protection, Low-Voltage, Site/Landscape Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 185

**Number of Calendar Days Added by Change Orders:** 55

**Name of Project Manager:** Jeff Hayes

**Name of Project Superintendent:** Levi Davis

**Names of Subcontractors:** A & K Painting, Advanced Concrete Cutting & Coring, ASSA ABLOY Entrance Systems, Building Center, Burgess Sales & Supply, Carocraft Cabinets, Classic Tile and Marble, Efficient Contractors, FESS Fire Protection, Garmon & Company, Harris Rebar, Herlocker Mechanical Systems, Johnson's Roofing Service, Knot Yet Cabinet Works, Lede Masonry, New South Specialties, Legacy Masonry, Otis Elevator Company, Palmetto Waterproofing, Quality Cleaning, Smith Ironworks, Union Glass & Metal, Warco Construction

**Reference:**

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Tuttle Company, Skip Tuttle, President, 803.366.1158

**Architect/Engineer's name and representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** McClure Nicholson Montgomery (Architect) Jim Montgomery, 704-332-6763, Jordan Skala (Engineer), Jonathan Brown, 704-599-4377 ext 1223

**Length of Business Relationship with Owner:** 35 Years

**MWBE Goal Approach:** We utilize minority businesses on all of our projects and keep a strong working relationship with qualified MWBE firms.

# HISTORIC 1939 BUILDING - PIEDMONT MEDICAL UPFIT

Rock Hill, SC



## KEY FEATURES:

- » *Historical redevelopment*
- » Tight Site Conditions
- » Marty Cooke worked on this project

This project was an 8,000 SF urgent care facility inside a historically renovated space. Construction consisted of new patient suites, an x-ray room, a nurses station, and general office space.

Existing paint had to be removed from the wood ceilings and wood restored/sealed. J.M. Cope salvaged existing timbers and doors that had to be removed for owner's use and sealed existing interior brick.

Construction activities were ongoing in an occupied building. Coordination with existing tenants was crucial to successful project delivery.

**Construction Cost at Time of GMP:** \$405,405

**Final Construction Costs:** \$487,146

**Final Project Size:** 8,000 SF

**Type of Construction:** Renovation and Upfit

### Preconstruction and Construction Phase

**Services:** Schematic, Design Development, Estimates, Construction Document Estimates, Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 107

**Number of Calendar Days Added by Change Orders:** 0

**Name of Project Manager:** Jeff Hayes

**Name of Project Superintendent:** Marty Cooke

**Names of Subcontractors:** Advanced Concrete Cutting & Coring, Carocraft Cabinets, Efficient Contractors, Elite Plumbing, ESP Associates, FESS Fire Protection, Garmon & Company, Giants Mechanical, New South Specialties, Quality Cleaning, Smith Ironworks, Steele's Mechanical, Union Glass & Metal

### Reference:

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Tuttle Company, Skip Tuttle, President, 803.366.1158

**Architect/Engineer's name and representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** McClure Nicholson Montgomery (Architect) Jim Montgomery, 704-332-6763, Jordan Skala (Engineer), Jonathan Brown, 704-599-4377 ext 1223

**Length of Business Relationship with Owner:** 35 Years

**MWBE Goal Approach:** We utilize minority businesses on all of our projects and keep a strong working relationship with qualified MWBE firms.

# CHESTER CO. NATURAL GAS HEADQUARTERS

Chester, SC



## KEY FEATURES:

- » *Municipal Project*
- » Marty Cooke worked on this project

In early 2017, J.M. Cope was entrusted with the construction of the new Chester County Natural Gas Authority (CCNGA) Headquarters. The project presented several unique challenges, with one of the most significant being the presence of extensive unsuitable fill material across the entire site. This obstacle threatened to escalate project costs substantially.

In response to this challenge, J.M. Cope demonstrated its commitment to client satisfaction and cost-efficiency. Our team collaborated closely with CCNGA leadership to devise an innovative solution that not only addressed the issue but also resulted in substantial cost savings of over \$500,000 for the project. By efficiently managing the removal and replacement of unsuitable fill material, we not only ensured the project's success but also channeled these saved funds back into the local subcontractor market, thereby benefiting the broader community. This client-focused problem-solving approach reflects our dedication to delivering value and excellence in every project we undertake.

**Construction Cost at Time of GMP:** \$5,523,289

**Final Construction Costs:** \$5,609,498

**Final Project Size:** 25,500 SF

**Type of Construction:** New

### Preconstruction and Construction Phase Services:

Schematic, Design Development, Estimates, Construction Document Estimates, Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 294

**Number of Calendar Days Added by Change Orders:** 22

**Name of Project Manager:** Wes Drummond

**Name of Project Superintendent:** Marty Cooke

**Names of Subcontractors:** Grading, Erosion Control, Storm Drainage, Site Utilities – Rogers Grading; Metal Studs, Drywall, Acoustical Tile, Roof Decking – Coleman Contractors; Mechanical/HVAC – Southeastern Plumbing, Heating, & AC; Electrical – Walker Electric Company; Roofing – Achelpohl Roofing and Sheetmetal; Flooring – FloorCo, Inc; Roll-Up Door & Dock Leveler – Assa Abloy; Masonry – Leder Masonry; Storefront & Glazing – Rock Hill Glass; Plumbing – RBP Plumbing; Transluscent Panel System – Carolina Architectural Products; Fencing – Lewis Fence Company

### Reference:

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Jason P. Stewart, 803.385.7350

**Architect/Engineer's name and representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** Carlisle and Associates; Ted Zanders, 803.252.3232

**Length of Business Relationship with Owner:** 6+ years

**MWBE Goal Approach:** 5.5%, We utilize minority businesses on all of our projects and keep a strong working relationship with qualified MWBE firms.

# MUSC DEPARTMENT OF CORRECTIONS

Chester, SC



This project was a renovation of a 36-bed wing of MUSC's Chester Medical Center for use by the SC Department of Corrections and included security upgrades & a new Intermediate Care suite.

**Construction Cost at Time of GMP:** \$2,426,253

**Final Construction Costs:** \$2,547,864

**Final Project Size:** 16,000 SF

**Type of Construction:** Renovation

## Preconstruction and Construction Phase Services:

General Construction, Mechanical, Plumbing, Fire Protection, Low-Voltage, Site/Landscape Master Project Schedule, Constructability Reviews, Value Management Reviews, Project Meetings, Safety Management, Cost Management, Trade Contracts, Quality Control, Schedule Management, Cost Control, Change Control, Closeout, Document Management, Owner Training

**Project Role:** General Contractor

**Number of Calendar Days in Original Schedule:** 152  
(March 2022- August 2022)

**Number of Calendar Days Added by Change Orders:**  
60 (March 2022- October 2022) Timeline was extended due to owner requested changes & lead times for specialty security materials \*3 change orders

**Name of Project Manager:** Garret Brink

**Name of Project Superintendent:** Don Holmes

**Names of Subcontractors:** Demo/ICRA- Custom Demo

& Dismantling; Detention Steel- HG Global Services, Inc.; Casework- Carolina Custom Millwork; Doors/Frames/ Detention Doors- U.S. Security Systems, Inc.; Glazing/ Detention Glazing- Grace Glass, LLC; Framing/Insulation/ Drywall/ACT-Acoustic Engineering Company of Florida; Paint-Turman Commercial Painters; Hard Tile-Trinity Interiors, LLC; Canopy-Austin Canvas & Awning; Toilet Accessories/ Curtains/Lockers-Precision Walls, Inc.; Fire Sprinkler-FESS Fire Protection; Plumbing & Med Gas-Herlocker Mechanical Systems, Inc.; HVAC-Rutherford Heating & Air Conditioning, LLC; Electrical-Winters Electric, Inc.; Low Voltage/Security/ Nurse Call-Network Cabling Infrastructures, LLC; Security Fencing- Catawba, LLC

## Reference:

**Owner's name and representative who served as the day-to-day liaison during the design and construction phases of the project, including telephone number:** Forest M. Jones, 901.326.9613

**Architect/Engineer's name and representative who served as the day-to-day liaison during the construction phase of the project, including phone number:** LS3P; Kevin Bryant, 843.577.4444

**Length of Business Relationship with Owner:** 3 years

**MWBE Goal Approach:** N/A due to COVID restrictions

## SECTION FIVE

# ABILITY TO ESTABLISH BUDGETS AND CONTROL COSTS ON PAST PROJECTS



**As your partner, we are dedicated to helping you mitigate risks and control costs through efficient design and construction practices and professionalism.**



**Our team's ability to create accurate control budgets, and ultimately a GMP, is rooted in our cost histories on similar CM at Risk projects that involve a combination of J.M. Cope's experience, historical data, and subcontractor input; this represents the most accurate way to develop a GMP early in the process.**

Describe your fiduciary responsibility as a CMR using Guaranteed Maximum Price contracts for publicly funded projects.

While a GMP is a great pricing tool, it is useless if it does not account for the Owner's wants, needs, and priorities for their project. **Our role is not to spend your money, but to help steward your money in a manner that best aligns with your project goals.**

To create a GMP, we begin by listening and asking strategic questions to grasp a firm understanding of your priorities, preferences, and expectations of the completed project. Incorporating these fundamental facets when developing the GMP allows us to guide decision making and build your project accordingly. **We know and understand that the Owners we partner with have a fixed budget to work within and therefore position ourselves alongside you to get the best possible value and return for your investment.**

Describe your cost estimating methods. From any of three (3) projects listed in response to Section 4 of the RFQ, describe how the estimates were developed, how often they were updated and the degree of accuracy achieved.

As your Contractor, one of our first priorities is to develop a control budget to assist in validating your project budget and serve as a baseline to compare to all future budgets. As the project moves forward through the design process, we update this baseline budget to reflect changes and relevant market conditions. Control estimates benefit your project by clearly communicating the project status, as well as to serve as a common foundation for all team members to access and discuss how the budget is being allocated.

Project	Degree of Accuracy
Lowenstein Building at University Center	93.84%
Historic Monroe Center Theatre	94.92%
Chester Co. National Gas Headquarters	98.46%

Once programming documents have been developed, we will work with the design team to establish a rough order of magnitude budget and there will be a collaborative approach with the owner and design team to ensure there is a clear understanding of systems and finishes selected so that the concept estimate captures cost with limited information that has been provided to date. We would provide a divisional breakdown budget with a narrative that we would review as

a group and record any take-aways and adjust as needed. In the interim, we would start listing out potential cost saving(s) options and vetting for constructability and alternative mechanical and electrical systems to relay pros and cons so they are designed on the front end to minimize any delays in lieu of redesign.

Once schematic documents have been developed, we would perform detailed take-offs for each scope of work and engage the market for limited sub feedback. At this time, we would start establishing our sub directory for prequalification. In addition to expanding upon alternates and value engineering.

Once design development documents have been developed, we would reconcile the schematic budget with updated take-offs and internal estimates and cast a wider net to the market to ensure each individual budget is tracking for current market conditions. Bid packages would start being drafted at this time for issuance in the construction document phase.

Once construction documents have been developed, bid packages for every trade would be issued to all prequalified bidders. Updated internal estimates would also be provided to use as a tool to confirm bidders priced the bid packages correctly and have the correct quantities and scope to mitigate any risk. At this time, we would recommend going to GMP.

Describe your cost control methods during construction and how you procure subcontractors, confirm scope, amount, and ensure proper payment.

#### **Cost Management Plan**

As your construction partner, we want to give the entire project team access to the project status at all times. **We utilize the latest in construction reporting tools to ensure you have visibility to the project budget, schedule, and site at all times.** Through weekly and monthly job meetings and hands-on monitoring of critical items, we take a proactive approach to securing early subcontractor buy-in and strictly adhering to the budget and schedule.

The project manager will be responsible for managing and reporting on cost throughout the project duration. During the monthly project status meeting, the project manager will meet with County officials to present and review the project's cost performance for the preceding month. Performance will be measured using percentage

of completion. The project manager is responsible for accounting for cost deviations and presenting options for getting the project back on budget.

#### **Subcontractor Selection**

One of the benefits of the CMAR process is that it allows our team to conduct a thorough subcontractor recruitment and prequalification effort to ensure participation by top quality firms with local and minority representation. Subcontractors are properly vetted through required prequalifications statements and references are checked before the most complete responsive quote is accepted. **We use our in-house contact list of over 1,500 subcontractors to ensure pricing is very competitive without sacrificing quality, timeliness, or safety on the project.** With key subcontractors, we will require a subcontractor bond or approved financials to verify the subcontractor has the adequate resources to ensure there are no issues during construction that impact the project schedule.

**Our process ranks subcontractors on the following:**

1. Track record of similar projects
2. Geographic location with a priority on reinvesting local tax dollars
3. Firm overall capabilities and financial stability
4. Minority or Women-Owned Business

Our team will work closely with Lincoln County to prioritize the qualification factors. We also ask County members to weigh in on subcontractor bids before awards are made to ensure all parties are comfortable.

**Describe your methodology for working with the project architect/engineer and their contractors to deliver a Guaranteed Maximum Price and to maintain the GMP throughout the design and construction process.**

We approach each project as a partnership and seek universal success for everyone involved —from clients to design partners to subcontractors. Each project team member offers different skills and knowledge that when function together create a superior project for all parties involved.

We have extensive experience coordinating complex projects with multiple stakeholders- including developers, County personnel, officials, design team members, and AHJs. We will provide constructability reviews, control estimates, cost and

systems analysis, total project scheduling, and GMP creation. These services are completed by the same project team that ultimately builds your project, ensuring the transition from preconstruction to construction is seamless.

**The owner intends to accept a Guaranteed Maximum Price prior to completion of construction documents.**

J.M. Cope acknowledges that the owner intends to accept a Guaranteed Maximum Price prior to completion of construction documents.

**Describe 1) Your process for ensuring that the design documents provide the information necessary to arrive at a complete GMP, including all owner requirements with reasonable contingency, and 2) Your process for subsequently ensuring that the 100% construction documents align with the project scope in the previously accepted GMP proposal documents.**

**During preconstruction, J.M. Cope takes an extra step to review design documents for practicality in construction, as well as help ensure the Owner's program and comments are fully addressed in the design.** These constructability reviews assist the Architect in producing quality construction plans and specifications, which minimizes questions and costly change orders and/or delays. Our reviews are typically conducted in tandem with budgets at the schematic, design development and construction document phases to increase efficiency.

During the project planning stages, alternative structures, materials, or systems will be suggested as cost or schedule saving options. Our team is skilled at thoroughly evaluating these options and presenting both the cost implications and any impact they may have on the project schedule, quality, or even building life-cycle costs.

The final constructability review is performed when the Architect completes 95% of the design documents. Constructability comments are issued in writing to the Architect and Owner to ensure full circle communication. If performed properly, a final constructability review should be a detailed, labor-intensive process, usually taking an average of three weeks. **Through our extensive preconstruction experience, J.M. Cope has developed a checklist of items to consider during a review of the contract documents.**

## SECTION SIX

### ABILITY TO MEET SCHEDULES ON PAST PROJECTS



**"J.M. Cope exceeded our expectation in terms of the quality in every respect, cost effectiveness, and timeliness."**

*| Kathy Sistare, RN  
Palmetto Tri-County Internal Medicine*



**Describe how you will develop, maintain and update the project schedule during design and construction.**

Our onsite Project Management staff including the project manager, site superintendent, and any assistant superintendents will monitor all onsite activities by comparing the on-going work to the approved set of drawings. Our superintendent will host a weekly subcontractor meeting to review and discuss in detail the project's specific three week look ahead schedule to understand upcoming phases of work and notify all trades what will be completed during this time so everyone progresses together. This also gives our team the chance to talk through coordination of the work to ensure the highest quality, reduce rework, and facilitate collaboration between sub trades.

**Project Tracking / Reporting to Track Project Performance**

To ensure all project team members stay abreast of project management functions and real-time updates, J.M. Cope utilizes Procore, a cloud-based project management program, to distribute, track, and answer all RFIs, as well as submit, review/approve, and distribute submittals and product data. The software's centralized capabilities—readily accessible to the design team, subcontractors, suppliers, and the Owner through any tablet/computer—allow the team to manage multiple aspects of the project. One of the biggest advantages of Procore is that the Owner is copied on all the communication threads and can review, respond and provide input at any juncture.

**DEMONSTRATED ABILITY TO MEET TIME AND BUDGET REQUIREMENTS**

PROJECT NAME	ESTIMATED DURATION	FINAL DURATION	SCHEDULE SAVINGS	ORIGINAL BUDGET	FINAL BUDGET
Laurens County Evidence Building	9 mths	8.5 mths	0.5	\$1,696,615	\$1,674,088
Applied Technology Center	13 mths	3 mths	10	\$7,026,000	\$6,483,450
Northside Elementary School	13 mths	11.5 mths	1.5	\$6,992,000	\$5,576,466

**Describe your approach to assuring timely completion of this project, including methods for schedule recovery, if necessary.**

We know controlling the schedule on a project is key. From project initiation, we evaluate the proposed schedule relative to scope and maintain that schedule through establishment of benchmarks, reviews and Integrated Project Collaboration. We utilize Submittal Exchange software and Procore, which allows all team members project visibility with the entire project team. This method of communication is a critical component in not only maintaining the design schedule but construction as well, making communication, tracking, and accountability available to all team members.

A construction schedule's effectiveness depends on maintaining it and identifying constraints early. Our project team collaborates with trade partners through weekly and monthly meetings to focus on key dates and critical items. J.M. Cope employs a systematic approach, relying on a 3-week look ahead and the master CPM schedule. We proactively prevent delays using schedule software and implement recovery plans if needed. We prioritize root cause identification and collaboration. Weekly stakeholder meetings ensure everyone is aware of constraints and solutions, continuing until the project is on track. In the preconstruction phase, we aim to minimize unknowns by incorporating critical activities related to regulatory agencies, submittals, procurement, delivery, owner equipment, and construction closeout into the baseline schedule.

**Describe how you develop and maintain work schedules during design and construction to coordinate with the owner's project schedule.**

Our project team is extremely well-versed in the requirements of bringing multiple shareholders together to achieve a common goal. After award, we will pull together a preliminary project schedule that will identify procurement milestones in order to ensure necessary material and equipment will be onsite before it is needed. Using our prequalification and bid leveling sheets during preconstruction, we can understand from subcontractors the necessary lead times of the required items and make sure those dates are accurately portrayed in the project schedule. When possible, we work to bring in items early and store onsite, or in insured off-site storage so that we can mitigate any risk of material/equipment shortages or any sort of material escalation charges.

## SECTION SEVEN

# KNOWLEDGE OF CURRENT CONSTRUCTION METHODOLOGIES, TECHNOLOGIES, AND BEST PRACTICES



**We purposely cultivate strong partnerships with our clients through a combination of cooperation, teamwork, and trust—an intentional approach that not only contributes to the success of all those involved, but to our ability to regularly exceed our clients' expectations.**



# KNOWLEDGE OF CURRENT CONSTRUCTION METHODOLOGIES, TECHNOLOGIES, AND BEST PRACTICES

**J. M. Cope believes it is our responsibility to deliver the highest quality of projects, which is achieved through continuously monitoring quality—beginning with design. From detailed planning through project execution with diligent supervision and inspections, quality is never something we compromise.**

Describe your experience working with historic buildings, construction techniques, and your subcontractors' experience with specialized historic repair (i.e. plaster repair.)

J.M. Cope is proud to be a part of several local revitalization projects including the Lowenstein Building at Knowledge Park, the 1939 Building Upfits, and the City of Monroe Center Theatre Renovation and Addition. Our team members understand that each historic renovation project is unique. From these projects, J.M. Cope has acquired knowledge of the process of revitalizing an historic structure.

Throughout any historic renovation project, our team keeps a focus on retaining the existing features of the building. During demolition, our crews worked diligently to preserve the wonderful details that went into the original building. Preserving materials when possible and thoughtfully duplicating them when necessary is a key component.

We know the long-lead items these historic renovation projects can run into and we know the vendors to help deliver them. We also have a working relationship with the Historic Preservation Office and know their regulations and processes. In the end, J.M. Cope is excited to help rejuvenate a rich part of Lincoln County's history.

## Historic Project Elements

### **1. Historical Construction Expertise:**

Our team possesses a comprehensive understanding of various architectural styles and construction techniques used in different historical periods. This knowledge is crucial for accurately assessing the needs of each historic building project.

### **2. Preservation Principles:**

A challenge lies in preserving the historical integrity of the building while ensuring that it meets modern functionality standards. Our team excels in finding the delicate balance between preservation and necessary upgrades, respecting the unique character of each structure. For example, our work renovating the historic Lowenstein Building in Rock Hill allowed us to maintain the core and shell of the original building from 1939 and 1954 while constructing new office, restaurant, and retail space.

### **3. Regulatory Navigation:**

Negotiating the regulatory landscape for historic preservation is a significant aspect of this work. This involves obtaining the required permits, adhering to local preservation guidelines, and collaborating effectively with historic preservation boards to ensure compliance. Our assigned project team for this job, including Marty Cooke, Coleman Clark, and Chad Webb, all have successfully completed multiple projects that require this important piece of the puzzle.

### **4. Skilled Subcontractors:**

Our team collaborates closely with subcontractors who specialize in historic repair, including experts in plaster repair. These subcontractors bring a wealth of experience in using traditional methods and materials, ensuring that repairs are not only structurally sound but also in keeping with the historical authenticity of the building. We have used these trusted partners on jobs such as our work renovating The Episcopal Church of the Good Shepherd which required extensive plaster work.

### **5. Adaptability and Problem-Solving:**

Historic buildings often present unforeseen challenges such as hidden structural issues or unique design complexities. Our team excels in adaptability, problem-solving, and finding creative solutions while still adhering to preservation standards. These traits were prevalent on our Lowenstein Building project that featured Tommy Clark on the project team. There were extensive unforeseen issues with the building, but our project team was able to minimize delays and still deliver a successful project that serves as a hub in our local community.

### **6. Community Engagement:**

We also recognize the cultural and community significance of historic buildings, and our approach involves engaging with the local community. Regular communication, community workshops, and transparency about the restoration process help build support and appreciation for the preservation efforts. This was extremely important to us while working on renovating the Monroe Center Theatre in North Carolina. The Theatre is a mainstay in the city's downtown area and the community was very interested in our progress. We were more than happy to give updates on our progress and methods.

Working on historic buildings involves a unique blend of expertise in construction techniques, a deep understanding of preservation principles, and effective collaboration with subcontractors experienced in specialized historic repairs, such as plaster repair. We have overseen multiple historic projects that have allowed us to demonstrate these capabilities.

# KNOWLEDGE OF CURRENT CONSTRUCTION METHODOLOGIES, TECHNOLOGIES, AND BEST PRACTICES

## 7. Continuous Learning:

We acknowledge the evolving nature of preservation practices, and our team is committed to continuous learning. This involves staying abreast of the latest technologies, methodologies, and research in the field to enhance the quality and authenticity of your work.

Our experience in historic preservation is multifaceted, requiring a combination of historical expertise, adherence to preservation principles, collaboration with specialized subcontractors, meticulous attention to detail, and active engagement with the community. It's a delicate balance between honoring the past and ensuring a sustainable future for these historic buildings.

Describe your quality assurance program. Explain the methods used to ensure quality control during the construction phase of a project.

## QUALITY CONTROL

### Quality Planning Process

Our planning process begins as the project is being designed. We will collaborate with your team to develop a comprehensive plan focused on how your project is built, including identification of critical shop drawing review points, scheduling pre-installation conferences with the design team and trades, identification of critical inspections and jobsite observation points, as well as product tests such as water penetration testing of the roof and exterior windows. **What differentiates J.M. Cope from many of our competitors is how knowledge is transferred throughout the various project phases.**

Where some construction managers choose to assign an entire Preconstruction group to a specific project who then relay information to the construction team, our Senior Project Manager and Superintendent are actively involved from the onset. Integrating the construction team early on enables the entire team to properly develop a plan that is executed more seamlessly through project completion and warranty period.

### Field Implementation

Our project Superintendent is the on-site representative who is responsible for the successful execution of your project specific quality plan. At J.M. Cope, we believe that quality cannot be "punched" into a project, but rather is attained through a diligent and daily pursuit and expedient resolution of any issues that may arise. Through the daily utilization of our "Rolling Punch List" tool, our Superintendent prioritizes identifying quality issues, documentation, and timely resolution before work proceeds.



Throughout the life of your project, we will provide a report each week to keep all stakeholders abreast of the project status - open communication is a top priority.

### Hidden Conditions

We recognize that all projects have instances of hidden or unforeseen conditions that may not have been captured during design, but must be managed properly to prevent rework, schedule, and budget impacts and/or unfavorable subcontractor performance in the field. At J.M. Cope, we pledge to always present a solution to the project team that results in the least impact to the project and one that preserves its quality.

Describe your procedures for implementing industry's "best practices" as defined by the Construction Industry Institute and similar organizations.

With a 40 year history, we have a long-running "lessons learned and best practices" List. As projects complete, we incorporate these best practices into our next project's planning phase, working closely with our design and engineering teams to integrate these standards into the project's design and specifications.

Throughout construction, our project management teams continually monitor and assess our progress against these best practices. We maintain open lines of communication with all stakeholders, including subcontractors, suppliers, and local authorities, to ensure that everyone is aligned with these standards. Regular safety briefings, quality control inspections, and environmental compliance checks are integral parts of our construction process.

Furthermore, we promote a culture of continuous improvement within our organization, fostering innovation and the implementation of emerging best practices as they evolve within the construction industry.

Provide an example of a successful constructability program used to maintain project budgets without sacrificing quality. We understand the importance of delivering high-quality projects while adhering to budget constraints. For example, on Chester County Natural Gas, we implemented a rigorous constructability program that yielded impressive results in

terms of cost control and overall project quality.

Here are key aspects of our strategy:

- **Early Collaboration:** We initiated collaboration with key stakeholders, including architects, engineers, subcontractors, and municipal representatives, at the project's inception. This facilitated open communication and the exchange of valuable insights to identify potential challenges and opportunities.
- **Value Engineering:** Through comprehensive value engineering, we identified cost-effective alternatives and optimized design solutions without compromising quality. This process allowed us to make informed decisions and maximize the value of every dollar spent.
- **Continuous Cost Monitoring:** Throughout the project lifecycle, we maintained strict budget oversight, continuously tracking expenses against the established baseline. Any deviations were promptly addressed, ensuring that the project remained on track financially.
- **Risk Management:** We proactively identified and mitigated potential risks, such as supply chain disruptions or unforeseen site conditions, to prevent costly delays and budget overruns.
- **Quality Assurance:** Our commitment to quality never wavered. We adhered to stringent quality control measures, conducting regular inspections and testing to ensure that construction met or exceeded industry standards.
- **Lean Construction Practices:** We implemented lean construction principles to optimize workflow, reduce waste, and enhance efficiency, which contributed to cost savings without compromising quality.

As a result of these efforts, Chester County Natural Gas was completed on time and within budget, while still achieving the highest standards of quality. The success of this project illustrates our dedication to balancing fiscal responsibility with quality outcomes.

Describe your firm's approach to safety and insuring safety while working on the site.

## SAFETY IS ALWAYS AN INTEGRAL PART OF

**EACH JOB WE DO.** Full participation, cooperation, and support are necessary to ensure the safety of all people and property involved in a construction project. To that end, we work hard to make certain that all our staff have the knowledge they need to create a safety-focused environment and are empowered to know that the safe decision is always the right decision.

## Lost Time Incident Rate (LTIR) for the past three years

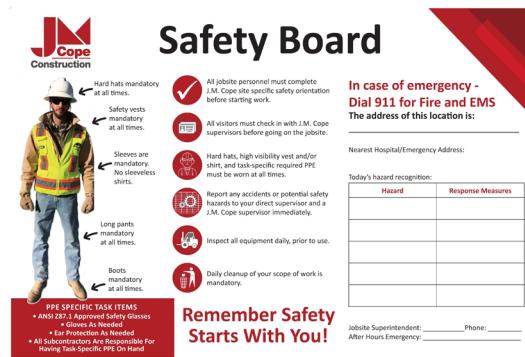
Present	0.00
2022	0.00
2021	0.00
2020	0.00

When Marty Cope founded J.M. Cope nearly 40 years ago, he made safety the company's number one priority. Our commitment to the health and safety of our employees, subcontractors, customers, and community remains just as steadfast today. We hold all J.M. Cope employees — from management to field laborers and everyone in between — accountable for upholding the highest of safety standards.

We provide our personnel with ongoing construction safety training and empower them under our STOP Work Responsibility guidelines with the ability to halt all work deemed unsafe. J.M. Cope conducts weekly toolbox safety meetings. We also conduct specialized safety planning meetings prior to beginning various stages of work and bring to the attention of all on site the associated hazards specific to that task. For instance, when steel is to be erected, we meet to discuss barricading, tie-off requirements, lift plans, and other relevant safety items.

To further reinforce our commitment, **we actively promote a safety culture that not only exceeds OSHA standards, but ensures that at the end of each day, all personnel return to their families unharmed.** To continually achieve that goal, we task our Safety Committee with regularly evaluating our processes to identify potential pitfalls so that we maintain the safest working environment possible.

We also regularly screen all employees with random drug tests and drug test after any incident on a site. Additionally, all staff are required to pass a drug screening prior to employment.



Every one of our jobsites includes signage throughout the site to keep safety top of mind.

## SECTION EIGHT

# SCOPE OF PRECONSTRUCTION SERVICES



**“Without hesitation, I would recommend J. M. Cope Construction for any challenging projects and would look forward to working with their able professionals again in the future.”**

*Ralph A. Misle  
Chief Jail Administrator, York County Sheriff's Office*



Describe proposed scope for preconstruction services.

### PRECONSTRUCTION SERVICES

Budgeting and planning are important during all stages of a CMAR project. Our processes, developed through years of experience in the local education market, create a seamless approach as the project moves from the Initial Design Phase through Post-Occupancy.

#### **Constructability Reviews**

During preconstruction, J.M. Cope takes an extra step to review design documents for practicality in construction, as well as help ensure the Owner's program and comments are fully addressed in the design. These constructability reviews assist the Architect in producing quality construction plans and specifications, which minimizes questions and costly change orders and/or delays. Our reviews are typically conducted in tandem with budgets at the schematic, design development, and construction document phases to increase efficiency.

The final constructability review is performed when the Architect completes 95% of the design documents. Constructability comments are issued in writing to the Architect and Owner to ensure full circle communication. If performed properly, a final constructability review should be a detailed, labor-intensive process, usually taking an average of three weeks.

Through our extensive preconstruction experience, J.M. Cope has developed a checklist of items to consider during a review of the contract documents.

#### **Control Estimates**

As your Contractor, one of our first priorities is to develop a control budget to assist in validating your project budget and serve as a baseline to compare to all future budgets. As the project moves forward through the design process, we

### **BEST PRACTICES IN CURRENT INFLATIONARY MARKET:**

1. Pricing Different Building Structural Systems
2. Monitoring Steel and Lumber Futures Market to Project Costs
3. Cost Matrix Approach to Substitute Materials
4. Value Engineering As-You-Go Approach



Our extensive preconstruction expertise, historical market data, and local knowledge of the subcontractor base helps ensure our preliminary budget is accurate.

update this baseline budget to reflect changes and relevant market conditions. Control estimates benefit your project by clearly communicating the project status, as well as to serve as a common foundation for all team members to access and discuss how the budget is being allocated.

Our team's ability to create accurate control budgets, and ultimately a GMP, is rooted in our cost histories on similar CMAR projects that involve a combination of J.M. Cope's experience, historical data, and subcontractor input; this represents the most accurate way to develop a GMP early in the process.

#### **Systems and Cost Analysis**

Many times, during the project planning stages, alternative structures, materials, or systems will be suggested as cost or schedule saving options. Our team is skilled at thoroughly evaluating these options and presenting both the cost implications and any impact they may have on the project schedule, quality, or even building life-cycle costs.

#### **Guaranteed Maximum Price (GMP)**

While a GMP is a great pricing tool, it is useless if it does not account for the Owner's wants, needs, and priorities for their project. Our role is not to spend your money, but to help steward your money in a manner that best aligns with your project goals.

To create a GMP, we begin by listening and asking strategic questions to grasp a firm understanding of your priorities, preferences, and expectations of the completed project. Incorporating these fundamental facets when developing the GMP allows us to guide decision making and build your project accordingly. We know and understand that the Owners we partner with have a fixed budget to work within and therefore position ourselves alongside you to get the best possible value and return for your investment.

## SECTION NINE

### CAPABILITIES: FINANCIAL AND LEGAL



**Our Team is excited about the opportunity to partner with Lincoln County to help repurpose the Historic Lincoln County Courthouse and positively impact your community for years to come.**



## FINANCIAL

Provide a current financial rating of your company and any documentation, including a Dunn and Bradstreet analysis, which indicates the financial stability of the company. **This requirement shall be submitted as a separate file named "Financial Rating – Confidential".**

Please see attached to thumbdrive.

Is your company currently in default on any loan agreement or financing with any bank, financial institution, or other entity? If yes, specify date(s), details, circumstances, and prospects of resolution.

No.

## LEGAL

Provide details of any current litigation, in connections with your company's performance under a contract for construction management and/or construction services. Describe the status of each suit or claim.

None.

Does any relationship exist between your company and any of the owner's officers, employees, or the architect whether relative, business associate, capital funding agreement or any other such kinship? If yes, please explain.

No.





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Building Leaders Who Build Communities