

# Qualifications for Owner's Representative for Richmond Library & Town Center Building Repairs

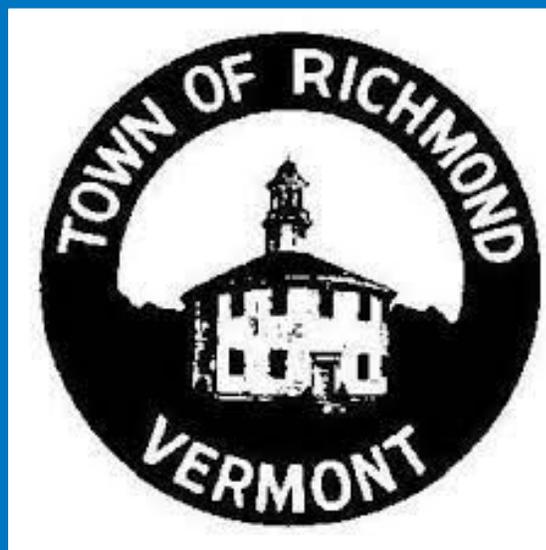
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**Submitted by Peterson Consulting, Inc.**

PO Box 4313  
Burlington, Vermont 05406

**July 6, 2021**



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**Attachments:**  
Experience Profile





July 2, 2021

Town of Richmond, Vermont  
Attn. Josh Arneson  
PO Box 285  
Richmond, VT 05477

Dear Mr. Arneson,

Thank you for the opportunity to provide this qualification package for Owner Project Manager (OPM) services for various Town of Richmond municipal projects. I believe that this information shows that we have the depth of experience and qualifications to provide critical OPM services to the Town. And we would love to be on your team!

I founded Peterson Consulting as an LLC in January, 2003, starting off as a one person shop. We changed our status to S-corp in 2005 and since then have grown our professional staff to serve a growing list of institutional clients. Our primary purpose is to represent your interests and make sure the projects are delivered on time and on (or under!) budget, while allowing you to make informed decisions and focus on your core business of delivering services to your citizens. How we do that is detailed in the attached qualification package. But just as important as the "how" is the "why". Simply put, we do this work because we believe that every project owner has the right to have their project proceed as smoothly and predictably as possible and for the best possible value.

One of our first clients was the Chittenden County Transportation Authority (now Green Mountain Transit) and they are still a valued client to this day. Since our founding we have been fortunate to provide OPM services to a growing list of municipal and publicly-funded clients including the Town of Colchester, the Town of St. Albans, and multiple school districts throughout northwest Vermont. We are very familiar with public funding requirements, permitting, design service procurement, contractor qualification, Davis-Bacon requirements, progress inspection, schedule and budget management and more. We are locally based in Burlington within a short twenty-minute drive to the Richmond Town Center. And with over fifty years of combined experience on staff and dozens of municipal and publicly-funded projects successfully completed, we are ready to take on your project assignments, large or small.

We have a team approach to all our projects. A lead Project Manager will be assigned to your project(s) with support and back-up from the rest of our professional staff. More information on our philosophy and approach to our work is contained in the following pages.

Again, thank you for the opportunity and please do not hesitate to contact me with any questions. We look forward to hearing from you.

Sincerely,

Thomas E. Peterson, LEED AP

Project Management . Budget Estimating . Progress Inspections . Needs Assessments  
PO Box 4313, Burlington, VT 05406

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## **Company Information**

### **Peterson Consulting, Inc.**

#### **Primary Areas of Service:**

Owner's Project Management Services  
General Project Planning  
Procurement (Design, Engineering, Energy, Contracting Services)  
Contractor Qualification  
Permit Assistance  
LEED Certification Assistance  
Estimating  
Value Engineering  
Bid and Contract Administration  
Progress Inspections and Reports  
Project Closeout

#### **Address and Primary Contact:**

Tom Peterson, Founder / Project Manager  
PO Box 4313, Burlington, Vermont 05406  
Telephone: 802-123-4567 Email: name@pcivt.com  
www.pcivt.com

#### **Legal Form of Ownership:**

Subchapter S Corporation. There is no parent company, nor are there any subsidiaries. Peterson Consulting is fully registered and authorized to do business in the State of Vermont.

#### **Years in Operation:**

Peterson Consulting, Inc. was founded as an LLC in 2003. On the advice of tax & accounting professionals, PCI incorporated as an S Corp. on July 1 2005.

STATE OF VERMONT  
OFFICE OF SECRETARY OF STATE

Certificate of Good Standing

I, James C. Condos, Vermont Secretary of State, do hereby certify that according to the records of this office

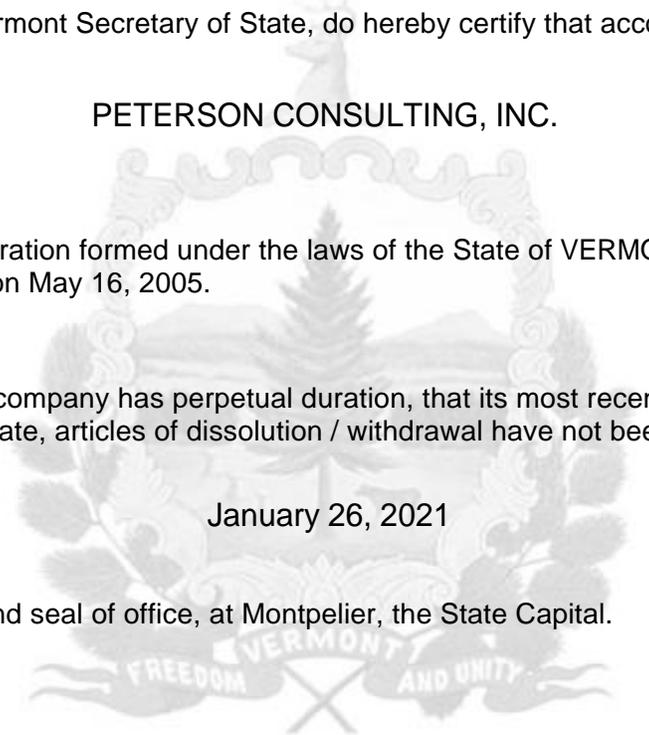
PETERSON CONSULTING, INC.

a Domestic Profit Corporation formed under the laws of the State of VERMONT, was filed for record in this office on May 16, 2005.

I further certify that the company has perpetual duration, that its most recent annual report is on file, and that as of this date, articles of dissolution / withdrawal have not been filed.

January 26, 2021

Given under my hand and seal of office, at Montpelier, the State Capital.



*James C. Condos*

James C. Condos  
Vermont Secretary of State



Business ID: 0126525  
Certificate Number: 2013790706001



## Our Approach and Methodology

Our technical approach to project management is guided by the Project Delivery Practice Guide, v2, published by the Construction Specifications Institute. This resource of “best practices” helps us work with the project team to develop a cost-effective project delivery framework and controls. Philosophically, we approach all of our projects in the spirit of collaboration, communication, continuity, and verification:

### *Collaboration*

We understand that projects and tasks do not exist in a vacuum; there is always more than one entity involved and the best success is achieved when all parties can agree on, and work toward a common goal.

### *Communication*

Successful completion of tasks and projects depends on clear, accurate, and respectful communication. As Project Managers it is part of our job to help establish and maintain clear channels of communication among all project stakeholders. We understand that it is just as valuable to ask the right questions as it is to come up with the right answers. When it comes to communication, our motto is, “Seek first to understand, then to be understood.”

### *Continuity*

We understand that as a key member of the project team, the Project Manager plays a major role in making sure the project moves forward as planned and meets the Owner’s goals. Establishing and maintaining relationships with all team members is essential, so it is important to have continuity in this role. To this end, we will assign a point person, and they will have overall responsibility for the performance of all Project Management tasks for this project.

### *Verification*

Ultimately all tasks and projects need to be completed accurately and according to the project goals and specifications. We believe the process of verification is an ongoing, collaborative effort of all project stakeholders and begins before the first shovel of dirt is turned and continues until the final punch-list is complete. Our Project Managers are experienced in discovering potential issues and coordinating with the contractor and A/E team to address those issues before they can cause delays or increase cost.



## General Statement of Qualifications

### Full Time Employees:

Tom Peterson, CSI, LEED AP | Hunter Gomez, CSI | Nathaniel Jamison, CSI, CDT | Audrey Clayton

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Peterson Consulting was founded by Tom Peterson in 2003 to provide comprehensive capital project planning and management services to project Owners. The company serves a wide range of clients in industries including transportation, housing, healthcare, and education.

As the Founder and Principal at PCI, Tom Peterson has overseen dozens of projects from the conceptual phase to completion. This included writing and administering many RFPs for Architectural and Engineering services, producing cost estimates, assisting the owner team in developing the program, and more.

Hunter Gomez is a resident of Franklin County. Prior to joining Peterson Consulting, Hunter served as project manager and project superintendent, overseeing the construction of over 100,000sf of town homes. Since joining Peterson Consulting Hunter has overseen the complex construction of a new adult primary care facility and coordinated the work between the owner and the A/E team, and the contractor. He has also overseen the renovation of a rehabilitation therapy facility and several school projects, and is experienced in site analysis and estimating.

Nathaniel Jamison is a certified Construction Document Technologist, and is experienced in reviewing contract documents, maintenance records, and energy audits. He has completed a HUD-sponsored training on the Davis-Bacon rules and regulations. He is also experienced in coordinating the services of architects and engineers and maintaining prompt and clear lines of communication with the Owner team.

Audrey Clayton is the most recent addition to Peterson Consulting's team. Prior to working with PCI, Audrey served as a project analyst for a construction supplier learning the ins and outs of the industry. This experience combined with their mechanical engineering education equips them to provide quality technical and administrative support to our team.

With a combined experience in the construction industry of over 50 years, in both administrative and technical roles, we believe Peterson Consulting is well suited to meet the needs of the Richmond Library & Town Center Building Repairs Project.

As with all of our assignments we will utilize a collaborative approach, drawing on the strengths of each team member to deliver your project in the most efficient manner, and of the highest quality.

# Thomas Peterson, CSI, LEED AP

## Founder, President



### EDUCATION

Champlain College, AS, 2000

### QUALIFICATIONS

- OSHA 10-Hour Health and Safety for Construction
- Green Building Basics & LEED Course
- CSI CDT 12-Hour Course

### PROFESSIONAL AFFILIATIONS

- LEED Accredited Professional
- CSI Member
- ACX 2019 Gold Sponsor
- Vermont Affordable Housing Coalition

Tom has over 30 years experience in the construction industry, founding Peterson Consulting, Inc. in 2003. Tom set out to make capital projects go as smoothly as possible, and allow owners to concentrate on their core mission. Tom has extensive experience as Owner's Project Manager in Education, Healthcare, Transportation and Housing.

### RELEVANT PROJECT EXPERIENCE

#### **Burlington High School ReEnvisioning:**

While this multi-year project is still in the design phase, we feel that it is an important testament to the trust the Vermont community places in PCI's capabilities and professionalism. Peterson Consulting was hired as Owner's Project Manager in a competitive process in April 2019, and since that time has coordinated the services of the A/E team, assisted in the selection of the Construction Manager, served as the public face of the project, and led the project team through programming, budget reconciliation, value engineering and more.

#### **Res-Tri Project:**

Part of Champlain College's Master Plan, this \$30 million dollar project now houses hundreds of students. Tom was instrumental in construction monitoring, value management, document and requisition review, and in serving as liaison between the project team and the various college and city departments.

#### **Downtown Transit Center:**

As Owner's Representative, Tom oversaw this logistically complex project. His responsibilities included early site analysis, budget estimating, value management, and construction monitoring. Tom and the team successfully navigated the logistical challenges and brought the project in under budget.

#### **Brewster Pierce Elementary HVAC Replacement:**

Tom oversaw the Project Management for the Chittenden East Supervisory Union, on this technical, and logistically challenging project. Tom was instrumental in seeing the project through to a timely, on budget completion.

#### **Winooski School District Projects:**

As Owner's Project Manager Tom worked with the WSD on a series of successful projects. From updating classrooms to meet code and be more welcoming to students, to the complete overhaul of the High School's HVAC system, Tom helped to guide each step of the process.

# Hunter Gomez, CSI

## Senior Project Manager



### EDUCATION

University of Vermont, BS, 2011

### QUALIFICATIONS

- OSHA 10 & 30 Hour
- OSHA Competent Persons Training
- Erosion and Sediment Control
- CSI, Construction Document Training

### PROFESSIONAL AFFILIATIONS

- CSI Member
- VT State Natural Shore and Land Erosion Control Certificate

With over 10 years experience in construction industry supervisory roles, Hunter brings a wide breadth of knowledge of building codes and regulations, industry techniques and practices, OSHA regulations, opinion of probable cost (OPC), and project management. Hunter forges excellent working relationships with owners, designers, contractors, subcontractors, and end users, allowing him to successfully navigate complex projects.

### RELEVANT PROJECT EXPERIENCE

#### Maple Run Unified School District:

Hunter Gomez served as Owner's Project Manager on two projects simultaneously for the Maple Run Unified School District. At Bellows Free Academy he oversaw the construction of a connector that bridged the outdoor space between the campus' two main buildings, greatly improving security and accessibility. At the Fairfield Center School Hunter oversaw the construction and fit up of a new music, art, and intervention room.

#### Recreation Center New Construction:

Hunter led PCI's effort in this OPC for a new, large recreation center and fieldhouse. The project and the OPC included both pre-engineered and traditionally framed sections, extensive specialty equipment, and alternates for both air-source heat pumps and a geothermal solution.

#### UVMCC Essex Adult Primary Care:

Hunter served as the Owner's Project Manager for this intricate and state-of-the-art primary care facility. The project was delivered through the Design-Build method, which required Hunter to coordinate cohesive teamwork and interfacing between all stakeholders.

#### Ophthalmology and Dermatology Fitup:

In another highly specialized OPC project, Hunter took the lead at PCI. Drawing on his experience as Project Manager of the construction of a new UVMCC clinic, Hunter created a comprehensive OPC.

# Nathaniel Jamison, CSI, CDT

Associate Project Manager



## EDUCATION

Kenyon College, BA, 2014

## QUALIFICATIONS

- CSI CDT 12-Hour Course
- NOLS Leadership Course
- HUD-sponsored Davis-Bacon Training
- OSHA 10-Hour Training

## PROFESSIONAL AFFILIATIONS

CSI VT Board Member

Natty has been involved in the construction industry since 2011 when he worked as a carpenter's assistant. Here he gained valuable perspective and field experience. After college, Natty interned at a large development company in Dallas Texas, where he assisted project managers in all aspects of their work. Since joining PCI, Natty has become familiar with all aspects of project delivery, particularly project administration and coordination.

## RELEVANT PROJECT EXPERIENCE

### **Winooski Housing Authority - RAD Project:**

Nathaniel has served as the Owner's Project Manager for 2 sub projects within RAD, and has been involved in the administrative work of the project as a whole. Maintaining project documents, schedule, and safety requirements are all part of the responsibilities involved in this project.

### **UVMHC Rehabilitation Therapy Renovation:**

Over the course of this project, Nathaniel helped coordinate professional services site visits, assisted in budget estimating, value engineering, and project research. He has assisted the project manager in all areas of administrative work.

### **UVMHC Essex Adult Primary Care:**

Throughout the duration of this project, Nathaniel has coordinated, organized, and procured the extensive equipment required for this project. This included communicating closely with end users to identify what was required, working with vendors to coordinate purchase, delivery and installation.

# Audrey Clayton

## Project Coordinator



### EDUCATION

Rice University, BSME, 2015

### QUALIFICATIONS

- HUD-sponsored Davis-Bacon Training
- OSHA 10-Hour Training

### SKILLS

- Construction Estimating
- Problem Solving
- Client Relations
- CAD Software: SolidWorks and AutoCAD

While studying Mechanical Engineering in college, Audrey was drawn to project management. After graduating, they first became involved in the construction industry in 2016 working as a project analyst for a snow guard supplier in Vermont. They gained valuable experience in this role providing technical project support, and interfacing with the wide array of industry actors. Audrey joined the PCI team in early 2021 and draws on this experience to provide support to the team's project delivery.

### RELEVANT PROJECT EXPERIENCE

#### **Town of Saint Albans New Town Hall:**

Audrey has been gaining experience and providing support for this new construction project currently in the Construction Document phase of design. They have provided support for contractor prequalification, issuing RFPs, proposal review, and cost estimating.

#### **Whitney Hill Homestead:**

Audrey is co-facilitating progress inspections for the renovation of Whitney Hill Homestead Independent Living Housing, and PCI's reporting on the project to Vermont Housing Authority.

#### **Project Administration:**

Coordinating meetings, recording minutes, assessing client needs, product research, and other administrative support for PCI's project load



# BFA Safety and Security Upgrades: Phase 1

## Saint Albans, Vermont

### Budget

\$5,722,153

### Architect

Arnold & Scangas Architects

### Contractor

Neagley & Chase  
Construction Company

### Owner

Maple Run Unified School  
District

### PCI Services

Owner's Project Manager,  
General Project Planning, Bid  
and Contract Administration,  
Progress Inspections and  
Reports, Project Close-Out

### Project Lead

Hunter Gomez

### Timeline

Spring 2020 - Fall 2020

### Contact

☎ 802-242-1600

✉ info@pcivt.com

🌐 www.pcivt.com



### Project Overview

PCI's Senior Project Manager, Hunter Gomez, served as Project Manager of the Bellows Free Academy Saint Albans safety and security upgrade. The largest part of this project was the addition of the connector that brings the once separate buildings together. This addition fundamentally changes the circulation and security of the school. Other upgrades included new electrical services, extensive rerouting of public and private utilities, new sprinkler services and coverage, new parking lots, and new student drop off areas. This project was completed on time and under budget.

### PCI's Functions

- Construction oversight
- Continuous progress inspections
- Progress reporting
- Contract administration
- Student and staff interfacing
- Scope modifications
- FF&E Procurement



# Johns River Apartments

## Derby, Vermont

### Budget

2.18 Million

### Architect

Scott & Partners

### Contractor

Kingdom Construction

### Owner

Rural Edge

### PCI Services

Progress Inspections and Reports

### Project Lead

Tom Peterson

### Timeline

February 2019 - December 2019

### Contact

☎ 802-324-4885

✉ info@pcivt.com

🌐 www.pcivt.com



### Project Overview

PCI served as Progress Inspector of the rehabilitation of this 23-unit development, Johns River Apartments. This apartment building is part of Rural Edge's portfolio of affordable housing in Northern Vermont. PCI completed monthly site visits to keep the Vermont Housing Finance Agency (VHFA), the funding agency, up to date on the project's progress. Each inspection was followed up with a written report submitted to VHFA.

### PCI's Functions

- Monthly progress inspections
- Pay application verification
- Progress reporting



# Stimson and Graves Apartments

## Waterbury, Vermont

### Budget

1.2 Million

### Architect

S2 Architecture

### Contractor

Naylor & Breen

### Owner

Downstreet Housing and  
Community Development

### PCI Services

Progress Inspections and  
Reports

### Project Lead

Natty Jamison

### Timeline

March 2020 - January 2021

### Contact

☎ 802-324-4885

✉ info@pcivt.com

🌐 www.pcivt.com



### Project Overview

PCI's Associate Project Manager, Natty Jamison, served as Progress Inspector of the rehabilitation of this 14-unit senior housing development, Stimson and Graves Apartments, owned by Downstreet Housing and Community Development. Natty completed monthly site visits to keep the funding agency up to date on the project's progress. Each inspection was followed up with a written report submitted to the Vermont Housing Finance Agency, the entity providing funding for this project.

Working on this project was a pleasure. Naylor and Breen are highly organized and professional. The requisitions were issued in a timely manner, allowing PCI to perform the progress inspections and generate the reports on time. Overall, this project was completed on time and under budget and we look forward to working with Naylor and Breen, and VHFA on future projects.

### PCI's Functions

- Monthly progress inspections
- Pay application verification
- Progress reporting



# Myers Park Pool Estimate

## Winooski, Vermont

### Project Budget

\$3.2 Million

### Engineer

Weston & Sampson

### Owner

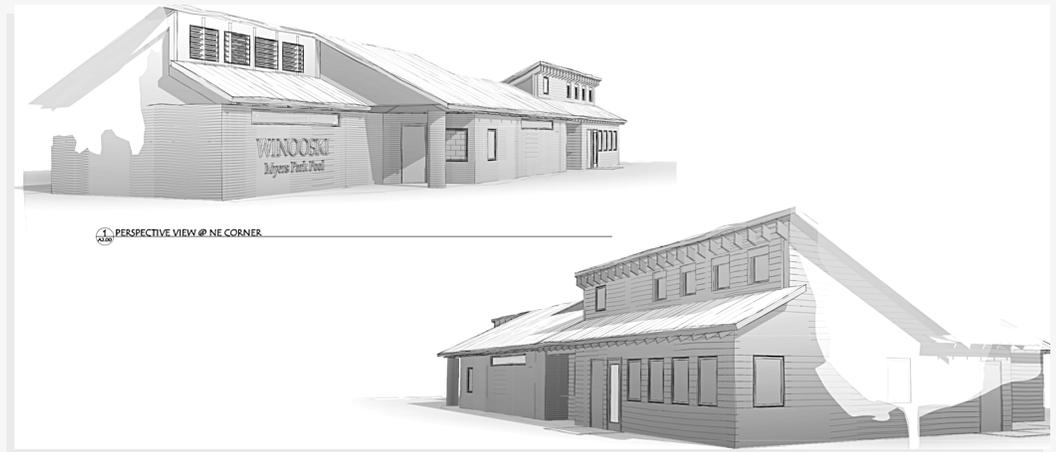
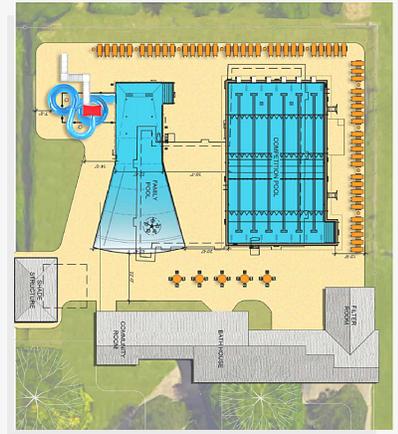
City of Winooski

### PCI Services

Estimating  
Value Management

### Project Manager

Hunter Gomez



### Project Overview

The Meyer's Memorial pool has long been a fixture of summers in Winooski, and an important part of the community. When Weston and Sampson contacted PCI to perform an estimate, we were happy to help ensure the project would flourish. PCI performed three estimates for this community pool renovation project. One was completed at 100% Design Development, one at 50% Construction Documents, and one at 100% Construction Documents. PCI's role in the project lasted for about 5 months while the project progressed through the design phase.

### PCI's Functions

- Performed detailed takeoffs at each stage.
- Carefully priced each element using our in-house database and working with community partners.
- Priced unusual specialty products.
- Assisted in value engineering.

### Contact

☎ 802-324-4885

✉ info@pcivt.com

🌐 www.pcivt.com



## References

### **Lazarus Scangas**

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Project Management . Budget Estimating . Progress Inspections . Facility Assessments

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## **Rate Sheet – 2021**

Standard Hourly Rate.....	\$98
Overtime Rate.....	\$147
Copies and Other Reimbursable Expenses.....	Cost + 10%
Mileage.....	Standard IRS Rate

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## **Rate Sheet – 2022**

Standard Hourly Rate.....	\$102
Overtime Rate.....	\$153
Copies and Other Reimbursable Expenses.....	Cost + 10%
Mileage.....	Standard IRS Rate

