



**HUBBARD & ASSOCIATES**  
Construction Project Management

P.O. Box 702  
Tualatin, Oregon 97062  
(503) 819-7505

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**Attachments:**

**Other Professional References/Client list**



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October 28, 2013

HAND DELIVERED

Sheridan School District  
Attn: DeAnn O'Neil, Business Manager  
435 South Bridge Street  
Sheridan, OR 97378

RE: CONSTRUCTION PROJECT MANAGER BID RESPONSE

Dear Ms. O'Neil,

Thank you for the opportunity to present Hubbard and Associates qualifications to you and the decision-making team. Hubbard and Associates (H&A), founded by Nancy Hubbard, is a certified 100% Woman Owned Business Enterprise (WBE) and Emerging Small Business (ESB). H&A was formed in 2004 to provide unique construction project management services 'from an owners perspective' to both public and private building owners. In 2009, H&A was engaged by Riverdale School District to help them manage the new grade school construction and extensive remodel of several existing buildings. In 2010 and 2011, respectively, H&A was selected to work on the bond improvement projects for West Linn Wilsonville School District and Tigard-Tualatin School District, both bond programs extended through Summer 2013. Since the Riverdale engagement, H&A has worked exclusively on school projects and looks forward to continuing to do so.

Nancy Hubbard, managing member and authorized representative of Hubbard and Associates will be assigned to work on the Sheridan School District projects.

H&A is currently wrapping up the 3<sup>rd</sup> year of projects for the Tigard-Tualatin School District (TTSD) that are most similar to those proposed for the Sheridan School District Bond Program. Those projects included window replacement, roof replacement, HVAC system (including boilers) replacement and/or major repairs, ADA improvements, outdoor sports facility replacement or upgrades, including tracks and other field events, installation of trash compactors, seismic upgrades, Science classroom upgrades and MDF/IDF room upgrades. H&A was able to help the TTSD with the permitting, land use approvals, selection of the consultant team, manage the low-bid process for contractor selection, monitor the budget and schedule during construction. Nancy Hubbard's expertise in all of these functions are especially

helpful with small school districts who do not have staff available to help or manage these functions.

H&A recent experience that is specifically relevant to your projects:

- **Communication.** Nancy Hubbard was recently commended by the TTSD School Board for her work in communicating project information effectively to the district staff, school board, contractors and consultants. As a result, the projects were complete on time and on or under budget and all parties were vested and pleased with the end results of the projects.
- **Land use planning/permitting:** Nancy Hubbard has extensive experience in obtaining land use approvals and working with various jurisdictions to get required approvals and permits for a variety of projects.
- **Budget and Forecasting:** Through a detailed budget tracking and forecasting system that H&A has developed, each line item of the budget (hard and soft costs) is forecast through the end of the project in order to determine future shortfalls and/or excesses between budget and actual. For TTSD, they were able to add a 3<sup>rd</sup> year of projects due to the savings from projects as well as the savings from consultant fees.
- **Project Coordination with Occupied Schools:** Occasionally it is necessary to have work on a project when there are students on site (summer programs and/or emergency projects required to be completed during a school year). H&A will coordinate between the school staff and the contractors to insure that construction activities occurring during school hours are save and minimally disruptive. In some cases, teachers have embraced the opportunity to create a learning experience out of the construction activities.
- **Procurement methods and contract structure:** H&A has extensive experience in managing the procurement process for bond projects, including determination of bid process to use, preparation of bid documents, management the pre-bid meetings, preparing the notice of intent to award, etc.

H&A looks forward to the opportunity to share our recent insights into similar projects and our observations from an Owner's Representative standpoint as to what to look for (and what to look out for) in your bond projects.

Sincerely,



Nancy T. Hubbard  
Managing Member

Hubbard and Associates



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## Statement Firm Qualifications

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### Firm History

Hubbard and Associates Development Consulting, LLC  
Formed in 2004,  
Offices located in unincorporated Clackamas County (Tualatin mailing address)  
**Qualified Woman Owned Business Enterprise (WBE),**  
**Emerging Small Business (ESB),**  
Certified EEO Affirmative Action Employer

Principal Member: Nancy T. Hubbard

**Office Address:** P.O. Box 702, Tualatin, OR 97062

H&A physical office location is in Wilsonville, just 44 miles from the Sheridan School District offices. H&A will not require office space or equipment at the Sheridan School District offices

**Service Area:** In order to provide the services and availability of services to our clients, Hubbard and Associates limits their work area to projects within a 2-hour drive of Portland.

### **Financial Stability and Firm Philosophy:**

Hubbard and Associates was formed in order to provide a high quality project and construction management service to public and private companies functioning from an owner's perspective at a lower cost than other options available. H&A accepts only a limited number of clients to insure that they always have the focus and availability for each client and project. Since H&A is a small firm, there is no financial pressure to over-commit resources to numerous clients in order to maximize profits. The Sheridan School District bond project will be a primary focus for H&A.

### **Summary of experience:**

- 20 Years experience in Construction/Project Management
- 10 years in public bond funded projects
- 18 years in managing land use entitlement
- 18 years in managing public information disclosure & public outreach
- Communication style that is direct, effective and non-confrontational
- Offers continuity and integrity in personal services

## School Project Experience

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2011-2013

**Tigard-Tualatin School District:** Provided Project and Construction Management services for all Capital projects, including managing the bid process, reviewing contracts, oversight of all projects, including project documentation and close out. Provided periodic updates to the School Board and internal bond team. Projects were funded through \$10 million dollars in Bond proceeds, plus \$5 million from other sources. Projects included the following:

New Construction:

2012-2013 - Bus Parking Facility – construction of bus parking facility on 6+-acre site. Included challenging site conditions and multiple governing jurisdictions. Completed in June 2013.

Roofing:

- 2013 -Twality Middle School – tear off, replace cold applied Tremco roof over cafeteria. Included removal of unused chimney, modifications to loading dock damaged by delivery trucks.
- 2012 -Tualatin High School – Tear off and replace entire roof. Equipment curb replacements, modifications at skylights.
- 2011-2012 Hazelbrook Middle School – completed phase 1 (2011) and phase 2 (2012) of re-roof of entire facility. Included removal and mechanical assessment of all roof top equipment, new curbs, skylight replacement.
- 2013 Durham Center School – Tear off and replace composition roof, re-build bell tower, re – roof flat section of roof.



Building Envelope Improvements:

- 2012-2013 Tualatin High School – repair/replace all windows – included re-sealing windows, removal and replacement of glass units and some replacement of entire storefront window systems.
- 2013 Alberta Rider Elementary School – remove and reinstall all exterior windows, remove and replace all exterior Hardy-panel and metal siding materials.

Freezer/Cooler Projects:

The following schools had full replacement of walk-in freezer/coolers:

2013 Fowler Middle School  
2012 Woodward Elementary School  
2012 Byrom Elementary School  
2012 Bridgeport Elementary School

The following schools had equipment replaced and/or moisture mitigation repairs:

2013 Metzger Elementary School  
2013 CF Tigard Elementary School  
2013 Alberta Rider Elementary School  
2013 Tualatin Elementary School  
2013 Tigard High School

Lead Paint Encapsulate Project:

2013 Durham Center School – removal of all loose exterior paint, prime and paint entire building. Included replacement and/or improvements to roof overhangs and railings.

Paving Projects:

Parking lot targeted replacement, includes tear up, grind down, overlay, seal coat and striping:

2013 Woodward Elementary School

2013 Byrom Elementary School

2013 Bridgeport Elementary School

2012-2013 Tigard High School (included reinforcement of utility tunnel and track and field improvements)

Sports facilities:

New Track Surfacing:

2012 Tigard High School – track, other field events, re-build girls softball field house and surrounding areas, new girls varsity locker room

Playground Drainage Improvements:

2013 Alberta Rider Elementary School

2013 Deer Creek Elementary School

Boiler replacement/major repairs:

2012 Twality Middle School

2012 Tigard High School

2012 Woodward Elementary School

Seismic Upgrades:

2012 Twality Middle School



Science Room Upgrades:

2012 Hazelbrook Middle School

2012 Twality Middle School

2012 Fowler Middle School

## **West Linn Wilsonville School District:**

2010-2013

**West Linn Wilsonville School District:** Participated in the bond team for \$100 million in bond proceeds. Hubbard and Associates provided FF&E procurement and OFCI/OFOI purchases for 5 library remodels and 2 new K-5 schools. Also provided project/construction management services for several smaller remodel and upgrade projects. Projects included the following:

### **Furniture Purchase, OFCI/OFOI procurement and installation services:**

Library remodels: Manage school district and committee decisions regarding selection, procurement, install and set up of furnishings for newly remodeled library (\$100k budget per school)

Boeckman Primary School  
Inza Wood Middle School

**Turnkey new K-5 schools:** Finalized all procurement of over 6000 items of furniture/supplies for each school. Coordinated delivery, installation and placement. Handled all other details not included in GC scope (residential appliances, interior window shades, gym wall pads, office equipment, etc.) Assisted with move coordination that involved significant internal moves from existing schools to the new schools. \$3 million total project cost, including technology purchases.

Lowrie Primary School  
Trillium Creek Primary School



**Construction Management services for major library additions/remodels and adjoining spaces,** included furniture purchase services: Assumed full CPM responsibility for entire project in April 2011; responsible for managing team, budget, schedule and procurement of all FF&E and owner supplied items. \$6 million dollar project cost.

Stafford Primary School  
Bolton Primary School  
CedarOak Park Primary School

**Exterior Drainage Improvement Projects:** PM duties for projects, including bid process, budget creation and monitoring, schedule and procurement of all FF&E and owner-supplied items. \$1 million dollar total project budget.

Cedar Oak Park Primary School – abandon dry wells, installation of new storm drainage system including retention pond.

Bolton Primary School – re-grade, install bank stabilization measures along creek bank to stop erosion.

Athey Creek Middle School/Stafford Primary School – interior remodel/upgrades



**Interior remodel/furniture purchase services:** Provide assistance in selecting new furniture for new spaces, including Superintendent office, executive conference rooms, etc.)

School District Administration Offices  
\$75k total project cost

## ***Riverdale School District 51J***

2009-2010

**Riverdale School District:** During initial site work for the new construction, Hubbard and Associates took on the full PM/CM responsibility for entire project, managed construction and design team, budget, schedule, FF & E, school move into new space, project close out, incentive funding applications, coordination of LEED Certification. Provided monthly reports to the school board. \$20 million dollar project cost.

### **Riverdale Grade School**





**SCHOOL DISTRICT PROJECT REFERENCES:**

Oregon Department of Education:  
Deputy Superintendent:  
Rob Saxton, 503-947-5740  
[Rob.saxton@state.or.us](mailto:Rob.saxton@state.or.us)

West Linn Wilsonville School District:  
Director of Operations:  
Tim Woodley 503-572-5444  
[woodleyt@wlwv.k12.or.us](mailto:woodleyt@wlwv.k12.or.us)

Facility Manager:  
Pat McGough 503-572-6251  
[mcgoughp@wlwv.k12.or.us](mailto:mcgoughp@wlwv.k12.or.us)

Tigard-Tualatin School District:  
Superintendent:  
Ernest Brown 503-431-4013  
[ebrown@ttsd.k12.or.us](mailto:ebrown@ttsd.k12.or.us)

Facility Manager:  
Phil Wentz, 503-431-4013  
[pwentz@ttsd.k12.or.us](mailto:pwentz@ttsd.k12.or.us)

Riverdale School District 51J  
Superintendents:  
2009-2010 Terry Hoagland  
2010-2011 Dr. Brook MacNamara

Jeremiah Patterson  
Principal of the Riverdale Grade School during the duration of the planning and construction. Currently at Sherwood School District:  
503-891-3671  
[jpatterson@sherwood.k12.or.us](mailto:jpatterson@sherwood.k12.or.us)

**Professional Liability Coverage:**

Commercial General Liability: Liberty Northwest  
\$1 million per occurrence, \$2 million aggregate

Business Automobile Coverage: Liberty Northwest  
\$1 million per occurrence

Excess Liability Coverage (Umbrella): Liberty Northwest  
\$4 million per occurrence, \$4 million aggregate

Professional Liability Coverage: RLI Insurance  
\$1 million per occurrence, \$2 million aggregate

***How Hubbard and Associates services differ from its competitors:***

- *Offers continuity of services with broad range of skills (no risk of a change in assigned staffing mid-project)*
- *True “Owner’s Representative” service perspective*
- *“What ever it takes” attitude towards achieving project objectives*
- *No corporate pressure to increase billings (e.g. additional services requests)*
- *Focus on total project budget (not just construction budget)*
- *Focus on schedule continues after certificate of occupancy to insure smooth transition from construction to facilities staff.*
- *Communication skills that can adapt to a wide variety of stakeholders.*
- *Work efficiently to keep cost down (will not provide duplicative services to increase billable hours)*
- *Able to foster a project team that wants to put in the extra effort to meet budget and schedule*
- *Especially effective with smaller school districts who do not have dedicated staffing for procurement or facility/operations management.*



## **HUBBARD & ASSOCIATES** Construction Project Management

### **PROJECT MANAGER**

#### **Summary of Personnel Experience:**

##### Nancy Hubbard - Construction/Project Management

- 20 years experience in public and private projects
- 18 years experience in obtaining land use approvals
- 25 years experience in finance and budget management

Ms Hubbard will personally manage the needs of the Sheridan School District projects and will insure that she is available to adequately cover all the district's needs with these projects. She has worked exclusively on school projects for the past 5 years, with duties ranging from full construction project and bond program management to assisting only with FF&E and technology items. Not only does Ms. Hubbard have a wealth of recent experience almost identical to the proposed projects identified for the Sheridan School District, but she also brings a broad range of skills especially beneficial to a smaller school district. With her educational base in finance and vast experience in contracts and procurement rules and methods she can manage the entire process, or assist district staff in managing these activities.

*"Nancy has consistently and competently represented the School District with the highest level of integrity. Nancy is a true professional that understands the complexity of public contracting as well as the technical details of successful construction"*

*Tim Woodley, WLWVSD, Director of Operations*

*"I've had the pleasure of working with Nancy Hubbard on \$10 million in construction bond projects and a variety of non-bond construction projects over the past 2 years. Her work has been fiscally conservative, the majority of the completed projects came in under budget, some quite significantly, and when there were unforeseen conditions that had to be addressed, the District was always informed early and involved in the resolution."*

*Phil Wentz, M.Ed., TTSD, Facilities Manager*

#### **Professional References:**

**Steve Olson, Principal, DOWA-IBI Group**

503-819-5364 or [steve.olson@dowa-ibigroup.com](mailto:steve.olson@dowa-ibigroup.com)

**Matt Lewis, Cardo Engineering**

503-419-2500 or [matt.lewis@cardnowrg.com](mailto:matt.lewis@cardnowrg.com)

**Kurt Zenner, Associate, Mahlum Architects, Inc.**

503-548-2268 or [kzenner@mahlum.com](mailto:kzenner@mahlum.com)

## **FULL CONSTRUCTION & PROJECT MANAGEMENT SERVICES:**

**Nancy Hubbard**, Founder and managing member of Hubbard and Associates will be assigned to this project to provide the following services.

### General Duties:

- Primary representative for project related communication, product reports/attend meeting as necessary
- Maintain project records to insure compliance with public requirements
- Provide client with information and recommendations to enable them to make informed decisions about the project.
- Interact with district staff as necessary to insure design and finished product will meet functional/operational needs of the department.
- Assist in project team solicitation and selection process



### Pre-Design Duties:

- Manage team to result in efficient and effective design efforts
- Create and monitor project budget and schedule, coordinate project cost with client accounting system needs.
- Provide client with information necessary to enable decisions related to initial cost of items vs. long-term benefits related to low maintenance and/or increased life cycle value.

### Design Phase Duties:

- Review and provide input on consultant contracts, structure and method of solicitation.
- Manage design process, continuously monitoring estimated project cost balanced with the value engineering process.
- Provide Client with recommendations regarding construction methods and alternates that will have an impact on cost and/or performance of the building.
- Manage or assist with contractor selection methodology, bid process and selection.

### Construction Phase Duties:

- Attend all construction meetings; site visits with architect or other consultants, special meetings regarding construction details.
- Insure accurate meetings documentation is provided, provide Client with additional information/reporting as necessary
- Manage budget, review RFI's, Change Order Requests and resulting change orders
- Photograph key stages of construction
- Manage schedule; provide Client with advance notice of anything on the horizon that might have a detrimental effect on the schedule.
- Manage contractor to insure on time/on budget completion.

### Close out Duties:

- Create and manage close out list, work with architect on punch list process
- Manage budget; provide final cost information and project records to Client.
- Manage team through punch and/or warranty corrective work, training on systems, and delivery of as-built's and O&M manuals.

**Hubbard and Associates can also arrange for or provide recommendations for the following additional consultant services:**

- **Environmental Consulting** – to assist in testing and inspection to identify possible hazardous materials frequently found in HVAC equipment, flooring, ceiling tiles, roofing materials, exterior paint, etc.
- **Construction Cost Estimating** - to provide third party cost estimates for larger more complex projects prior to finalizing scope and taking to bid.
- **Construction test and inspection services** – to provide testing and inspection services when required by governing jurisdiction or requested by owner.
- **Building Envelope Consulting** – to provide forensic analysis for water intrusion issues, such as window replacements, HVAC roof penetrations, roof leaks, ground water leaks, etc.



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Construction Project Management

## Statement of Program Approach

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Hubbard and Associates is uniquely qualified to manage all the tasks identified in the Sheridan School District RFP through its assignment of Nancy Hubbard to manage this project. Ms. Hubbard is noted for her attention to detail, excellent communication methods adaptable to a wide variety of stakeholders, as well as her personal and extensive experience in bidding, land use, permitting, tracking systems for project costs and skill in managing the project team to achieve the best results for each project. The following is an outline of the approach Ms. Hubbard would take to the Sheridan School District Projects. Clearly time is of the essence, since the ideal bidding time for Summer 2014 projects would be in early spring 2014.

### Develop Schedule and Prioritization.

Recommend using the winter to identified and create a prioritized list projects. The following items should be discussed and considered:

- Identify consultants needed to provide design/professional services for the various projects; initiate consultant solicitations.
- Categorize projects into groups that can be put out to bid as a package and/or via select invitation to bid.
- Determine expected duration of each project and dependencies (i.e. weather, power shutdown, other needs that will effect timing)
- Identify time frames when construction cannot be done (school events, furlough days, school testing, summer programs, etc.)
- Consider contractor work hours/other considerations (safety, procedural, staging, etc.)
- Discuss contractor selection process, bid timing/process. Discussion should include consideration of swing shift work by the contractor for some projects.

### Budget and bid packaging.

- Continue to fine-tune the estimated costs as the scope and timing of each project progress.

- Create a hard cost contingency appropriate for the type of project and likelihood of encountering hazardous materials, items possibly triggering updated code requirements, neighborhood concerns, permit requirements, etc.
- Group projects when possible for economies of scale and ease of bidding and management (i.e. roofing, paving, track improvements, etc.)
- Review total bond requirements/restrictions to insure scope of work remains within the identified bond title.

**Process and Procedures.**

- Set bond team meeting schedule/construction meeting schedule and required (and not required) participants.
- Establish realistic timeframes for critical path tasks
- Determine extent of investigation required (or possible) prior to start of project (i.e. based on district prior experience and historic records and quality of as-built drawings, if available).
- Determine consultant team members required in addition to architect and engineers identified above (i.e. geotech, environmental, structural, test and inspection) and team responsibilities.
- Establish project numbers and review reporting requirements, including communication requirements (i.e. web updates, direct communication with stakeholder group, etc.)
- Establish financial record keeping system, payment tracking and processing desired by Business office (including documentation for prevailing wage requirements)
- Discuss and establish desire for green building practices to be included in the bid notifications/instructions.
- Review commitments made to the public regarding use of the bond funds periodically to insure compliance.
- Confirm timing requirements for bond funds (i.e. spent or committed within specified period of time)

**Availability and Accessibility:**

Hubbard and Associates offices are in Clackamas County approximately 44 miles from the Sheridan School District boundaries, allowing H&A to get from their office to any one of the Schools on the project list within an hour. H&A has more than adequate capacity to provide Sheridan School District projects with the service and attention they require and will insure they remain a priority for the duration of the bond.

Hubbard and Associates will not require district office space or equipment.



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The following fee estimate is based on a time and material with a not to exceed maximum. The estimates hours are categorized into the stages described in the Project Approach section and are estimates based on prior experience with similar clients and scope. I expect that though efficiencies once we get started with the projects, we will be able to reduce the amount of time required for the various stages to result in some savings. For example, the third year of projects for the Tigard-Tualatin School District was similar in size and scope to your project list - it was \$2.7 million in bond funds used for 5 projects (some of which were multiple school projects). H&A had 346 total billable hours for these projects for the 10 months ending October 31, 2013. That included design management, bidding, contracts, project management and the majority of the project close out. Considering that the TTSD projects benefited from the relationships and routine established through the first 2 years of projects, I would still expect that the amount shown below, as the not-to-exceed maximum should be more than adequate to cover the identified work.

**PROJECT COST SHEET**

**PROJECT: SHERIDAN SCHOOL DISTRICT**  
CAPITAL BOND PROJECTS 2013

Hubbard and Associates

RFP Response  
28-Oct-13

PROJECT PHASE		SCHEDULE AND PRIORITIZE	DESIGN & CONSTRUCTION DOCUMENTS	BID PROCESS (LIKELY SEVERAL STAGES)	PROJECT CONSTRUCTION DURATION (NOT CONSTANT)	PUNCH & CLOSEOUT (EACH PROJECT OR PHASE)	TOTAL HOURS/COST
PROPOSED PHASE DURATION (NOTE: not necessarily contiguous timing with frequently overlapping timeframes)		5 WEEKS	10 WEEKS	9 WEEKS	14 WEEKS	4 WEEKS	
STAFFING PLAN:							
1. PROGRAM MANAGER	<b>NT HUBBARD</b>	<i>INCORPORATED INTO FULL CPM SERVICES IDENTIFIED BELOW</i>					
	HOURS						
	FEE						
2. CONSTRUCTION PROGRAM/PROJECT MANAGER	<b>NT HUBBARD</b>						
NOTE: Number of hours for each stage are rough estimates and maybe higher or lower as project progresses. All efforts will be made to minimize consultant fees	HOURS	50	60	80	350	60	600
	FEE	\$ 130.00	\$ 130.00	\$ 130.00	\$ 130.00	\$ 130.00	\$ 78,000.00
3. ADMINISTRATIVE SERVICES	<b>NT HUBBARD</b>	<i>INCORPORATED INTO ABOVE SERVICES, NO SEPARATE CHARGE</i>					
Note: With today's technology, there is little need for separate admin staff and in fact is more efficient for the CPM to manage the record keeping while managing the project. Hubbard and Associates also recommends that the CPM not duplicate any services already provided by the GC or Architect (i.e. meeting minutes,RFI logs, etc.) but rather reviews and supplements as needed.	HOURS						
	FEE						
ESTIMATED REIMBURSABLES:		NONE	NONE	NONE	NONE	NONE	\$ -
<b>TOTAL ESTIMATED COST FOR CPM SERVICES</b>							<b>\$ 78,000.00</b>

NOTE: THE ABOVE ARE ESTIMATES OF THE AMOUNT OF HOURS THAT MAY BE TYPICALLY NEEDED FOR SIMILAR PROJECTS. HOWEVER, THE AMOUNT OF TIME WILL VARY DEPENDING ON THE PROCESS AND CONSTRUCTION TEAM ESTABLISHED BY THE BOND TEAM.





**HUBBARD & ASSOCIATES**  
Construction Project Management

**Other Professional References/Client list**

**CLIENTS:**

STATE OF OREGON – DEPARTMENT OF EDUCATION  
TIGARD-TUALATIN SCHOOL DISTRICT  
WEST LINN WILSONVILLE SCHOOL DISTRICT  
HEERY INTERNATIONAL  
PORTLAND PUBLIC SCHOOLS  
CITY OF VANCOUVER  
CLARK COUNTY  
MULTNOMAH COUNTY  
CITY OF PORTLAND  
VANCOUVER HOUSING AUTHORITY

**ARCHITECTS/ENGINEERS:**

DOWA-IBI GROUP  
CARDNO WRG  
GHD CIVIL ENGINEERS  
NISHKAN DEAN STRUCTURAL ENGINEERS  
MAHLUM ARCHITECTS  
ANKROM MOISAN ARCHITECTS  
LRS ARCHITECTS  
WILLIAM WILSON ARCHITECTS  
WATTENBARGER ARCHITECTS  
MYHRE GROUP ARCHITECTS