

SECTION 00 41 00

BID FORM

THE PROJECT AND THE PARTIES

1.01 TO:

- A. Center Cass School District 66
District Office
699 Plainfield Road
Downers Grove, Illinois 60516

1.02 FOR:

- A. Project: Summer 2025 HVAC Upgrades
B. Project Number: 243065
701 Plainfield Road
Downers Grove, Illinois 60516

We have examined the Contract Documents for the proposed Summer 2025 HVAC Upgrades as prepared by Wold Architects and Engineers, St. Paul, Minnesota, and the conditions affecting the work.

1.03 DATE: 09/03/2024 (BIDDER TO ENTER DATE)

1.04 SUBMITTED BY: (BIDDER TO ENTER NAME AND ADDRESS)

- A. Bidder's Full Name Helm Mechanical
1. Address 900 Oakmont Ln. Suite 200
2. City, State, Zip Westmont, IL 60559
3. Telephone Number (630) 891-3400
4. Fax Number (630) 891-3401

1.05 ACCEPTANCE

- A. Accompanying this proposal is a Bid Security for all work, required to be furnished by Contract Documents, the same being subject to forfeiture in the event of default by the undersigned.
B. I agree to complete the Project, provided a contract is executed within 30 calendar days, by August 9, 2025.
C. I understand the Owner reserves the right to reject any or all bids, and it is agreed that this bid may not be withdrawn for a period of thirty (30) days from the opening thereof.

1.06 BASE BID

- A. The Bidder agrees to perform all work including General, Mechanical and Electrical Construction including an allowance sum of \$10,000 for the Base Bid Sum of:
two million one hundred thirty two thousand Dollars \$ 2,132,000

1.07 ALTERNATES

- A. The Bidder agrees to add to or deduct from the Base Bid Sum the following amounts to perform the alternate work described in Section 01 23 00, including all associated costs.
1. Alternate No. 1 - Electrical Wiring Replacement
ADD one hundred forty nine thousand six hundred Dollars \$ 149,600

1.08 ADDENDA

- A. The following Addenda have been received. The modifications to the Bid Documents noted below have been considered and all costs are included in the Bid Sum.
1. Addendum(s) # 1, 2, 3

1.09 BID FORM SIGNATURE(S)

Helm Mechanical

(Bidder - print the full name of your firm)
was hereunto affixed in the presence of:

Dave Schramm, Vice President
(Authorized signing officer, Title)

(Signature)



AIA Document A310™ – 2010

Bid Bond

CONTRACTOR:

Helm Mechanical
900 Oakmont Ln, Suite 200
Westmont, IL 60559

SURETY:

Fidelity & Deposit Company of Maryland
1299 Zurich Way
Schaumburg, IL 60196

OWNER:

Center Cass School District 66
699 Plainfield Rd
Downers Grove, Illinois 60516

BOND AMOUNT: Ten Percent of Bid (10% of Bid)

PROJECT: Center Cass SD 66 - Summer 2025 HVAC Upgrades

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification,

Any singular reference to Contractor, Surety, Owner or other party shall be considered plural where applicable,

Project Number, if any-

The Contractor and Surety are bound to the owner in the amount set forth above- for the payment. of which the Contractor and Surety bind themselves, their heirs, executors, administrators, successors and assigns, jointly and severally., as provided herein. The conditions of this Bond are such that if the Owner accepts the bid of the Contractor within the time specified in the bid documents, or within such time period as may be agreed to by the Owner and Contractor and the Contractor either (1) enters into a contract with the Owner in accordance with the terms of such bid, and gives such bond or bonds as may be specified in the bidding or Contract Documents. with a surety admitted in the jurisdiction of the Project and otherwise acceptable to the Owner, for the faithful performance of such Contract and for the prompt payment of labor and material furnished in the prosecution thereof, or (2) pays to the Owner the difference., not to exceed the amount of this Bond, between the amount specified in said bid and such larger amount for which the Owner may in good faith contract with another party to perform the work covered by said bid, then this obligation shall be null and void. otherwise to remain in full force with effect. The Surety hereby waives any notice of an agreement between the Owner and Contractor to extend the time in which the Owner may accept the bid- Waiver of notice by the Surety shall not apply to any extension exceeding sixty (60) days in the aggregate beyond the time for acceptance of bids specified in the bid documents. and the Owner and Contractor shall obtain the Surety's consent for an extension beyond sixty (60) days

If this Bond is issued in connection with a subcontractor's bid to a Contractor, the term Contractor in this Bond shall be deemed to be Subcontractor and the term owner shall be deemed to be Contractor.

When this Bond has been furnished to comply with a statutory or other legal requirement in the location of the Project, any provision in this Bond conflicting with said statutory or legal requirement shall be deemed deleted herefrom and provisions conforming to such statutory or other legal requirement shall be deemed incorporated herein When so furnished, the intent is that this Bond shall be construed as a statutory, bond and not as a common law bond-

Signed and sealed this 27th day of August, 2024

(Witness)

Helm Mechanical
(Principal)

(Seal)

Vice President

(Witness)

Fidelity & Deposit Company of Maryland
(Surety)

(Seal)

Stephanie Amborn
(Title)

Stephanie Amborn
Attorney in Fact

Init.

**ZURICH AMERICAN INSURANCE COMPANY
COLONIAL AMERICAN CASUALTY AND SURETY COMPANY
FIDELITY AND DEPOSIT COMPANY OF MARYLAND
POWER OF ATTORNEY**

KNOW ALL MEN BY THESE PRESENTS: That the ZURICH AMERICAN INSURANCE COMPANY, a corporation of the State of New York, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, a corporation of the State of Illinois, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND a corporation of the State of Illinois (herein collectively called the "Companies"), by **Robert D. Murray, Vice President**, in pursuance of authority granted by Article V, Section 8, of the By-Laws of said Companies, which are set forth on the reverse side hereof and are hereby certified to be in full force and effect on the date hereof, do hereby nominate, constitute, and appoint David L. TOWNSEND, Stephanie AMBORN, Judith L. ZIER, Julie A. TRESEMER, Robert W. SNYDER, Joseph J. CLINTON, III, Rebecca NORWOOD, Erica L. KIELTY of Rockford, Illinois, its true and lawful agent and Attorney-in-Fact, to make, execute, seal and deliver, for, and on its behalf as surety, and as its act and deed: **any and all bonds and undertakings**, and the execution of such bonds or undertakings in pursuance of these presents, shall be as binding upon said Companies, as fully and amply, to all intents and purposes, as if they had been duly executed and acknowledged by the regularly elected officers of the ZURICH AMERICAN INSURANCE COMPANY at its office in New York, New York., the regularly elected officers of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at its office in Owings Mills, Maryland., and the regularly elected officers of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at its office in Owings Mills, Maryland., in their own proper persons.

The said Vice President does hereby certify that the extract set forth on the reverse side hereof is a true copy of Article V, Section 8, of the By-Laws of said Companies, and is now in force.

IN WITNESS WHEREOF, the said Vice-President has hereunto subscribed his/her names and affixed the Corporate Seals of the said **ZURICH AMERICAN INSURANCE COMPANY, COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and FIDELITY AND DEPOSIT COMPANY OF MARYLAND**, this 01st day of December, A.D. 2022.



ATTEST:
ZURICH AMERICAN INSURANCE COMPANY
COLONIAL AMERICAN CASUALTY AND SURETY COMPANY
FIDELITY AND DEPOSIT COMPANY OF MARYLAND

A handwritten signature in black ink, appearing to read 'Robert D. Murray', is written over a horizontal line.

By: *Robert D. Murray*
Vice President

A handwritten signature in black ink, appearing to read 'Dawn E. Brown', is written over a horizontal line.

By: *Dawn E. Brown*
Secretary

State of Maryland
County of Baltimore

On this 01st day of December, A.D. 2022, before the subscriber, a Notary Public of the State of Maryland, duly commissioned and qualified, **Robert D. Murray, Vice President and Dawn E. Brown, Secretary** of the Companies, to me personally known to be the individuals and officers described in and who executed the preceding instrument, and acknowledged the execution of same, and being by me duly sworn, depose and saith, that he/she is the said officer of the Company aforesaid, and that the seals affixed to the preceding instrument are the Corporate Seals of said Companies, and that the said Corporate Seals and the signature as such officer were duly affixed and subscribed to the said instrument by the authority and direction of the said Corporations.

IN TESTIMONY WHEREOF, I have hereunto set my hand and affixed my Official Seal the day and year first above written.



A handwritten signature in black ink, appearing to read 'Constance A. Dunn', is written over a horizontal line.

Constance A. Dunn, Notary Public
My Commission Expires: July 9, 2023

EXTRACT FROM BY-LAWS OF THE COMPANIES

"Article V, Section 8, Attorneys-in-Fact. The Chief Executive Officer, the President, or any Executive Vice President or Vice President may, by written instrument under the attested corporate seal, appoint attorneys-in-fact with authority to execute bonds, policies, recognizances, stipulations, undertakings, or other like instruments on behalf of the Company, and may authorize any officer or any such attorney-in-fact to affix the corporate seal thereto; and may with or without cause modify or revoke any such appointment or authority at any time."

CERTIFICATE

I, the undersigned, Vice President of the ZURICH AMERICAN INSURANCE COMPANY, the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY, and the FIDELITY AND DEPOSIT COMPANY OF MARYLAND, do hereby certify that the foregoing Power of Attorney is still in full force and effect on the date of this certificate; and I do further certify that Article V, Section 8, of the By-Laws of the Companies is still in force.

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the ZURICH AMERICAN INSURANCE COMPANY at a meeting duly called and held on the 15th day of December 1998.

RESOLVED: "That the signature of the President or a Vice President and the attesting signature of a Secretary or an Assistant Secretary and the Seal of the Company may be affixed by facsimile on any Power of Attorney...Any such Power or any certificate thereof bearing such facsimile signature and seal shall be valid and binding on the Company."

This Power of Attorney and Certificate may be signed by facsimile under and by authority of the following resolution of the Board of Directors of the COLONIAL AMERICAN CASUALTY AND SURETY COMPANY at a meeting duly called and held on the 5th day of May, 1994, and the following resolution of the Board of Directors of the FIDELITY AND DEPOSIT COMPANY OF MARYLAND at a meeting duly called and held on the 10th day of May, 1990.

RESOLVED: "That the facsimile or mechanically reproduced seal of the company and facsimile or mechanically reproduced signature of any Vice-President, Secretary, or Assistant Secretary of the Company, whether made heretofore or hereafter, wherever appearing upon a certified copy of any power of attorney issued by the Company, shall be valid and binding upon the Company with the same force and effect as though manually affixed.

IN TESTIMONY WHEREOF, I have hereunto subscribed my name and affixed the corporate seals of the said Companies, this 27th day of August, 2024.





By: Mary Jean Pethick
Vice President

TO REPORT A CLAIM WITH REGARD TO A SURETY BOND, PLEASE SUBMIT A COMPLETE DESCRIPTION OF THE CLAIM INCLUDING THE PRINCIPAL ON THE BOND, THE BOND NUMBER, AND YOUR CONTACT INFORMATION TO:

Zurich Surety Claims
1299 Zurich Way
Schaumburg, IL 60196-1056
Ph: 800-626-4577

If your jurisdiction allows for electronic reporting of surety claims, please submit to:
reportsfclaims@zurichna.com

Authenticity of this bond can be confirmed at bondvalidator.zurichna.com or 410-559-8790

ATTORNEY-IN-FACT AFFIDAVIT

STATE OF ILLINOIS

COUNTY OF STEPHENSON

Before me, a Notary Public, personally came Stephanie Amborn known to me, and known to be the Attorney-in-Fact of Fidelity & Deposit Company of Maryland, which executed the attached bond as surety, who deposed and said that his signature and the corporate seal of said Fidelity & Deposit Company of Maryland were affixed by order and authority of said Company's Board of Directors, and that the execution of the attached bond is the free act and deed of Fidelity & Deposit Company of Maryland.

Given under my hand and seal this 27th day of August, 2024.



Notary Public



AIA[®] Document A305[™] – 1986

Contractor's Qualification Statement

The Undersigned certifies under oath that the information provided herein is true and sufficiently complete so as not to be misleading.

SUBMITTED TO: Center Cass School District 66
699 Plainfield Rd.
Downers Grove, IL 60516

SUBMITTED BY: Helm Mechanical

NAME: Dave Schramm

ADDRESS: 2279 Yellow Creek Road
Freeport IL 61032

PRINCIPAL OFFICE:

- ☒ Corporation
☐ Partnership
☐ Individual
☐ Joint Venture
☐ Other

NAME OF PROJECT: *(if applicable)*

TYPE OF WORK: *(file separate form for each Classification of Work)*

- ☒ General Construction
☒ HVAC
☐ Electrical
☒ Plumbing
☒ Other: *(Specify)* Process Piping, Aquatic Piping, Steel Fabrication

§ 1 ORGANIZATION

§ 1.1 How many years has your organization been in business as a Contractor? 53 Years

§ 1.2 How many years has your organization been in business under its present business name? 53 Years

§ 1.2.1 Under what other or former names has your organization operated?

§ 1.3 If your organization is a corporation, answer the following:

- § 1.3.1 Date of incorporation: 1/2/90
§ 1.3.2 State of incorporation: Illinois
§ 1.3.3 President's name: Brian Helm
§ 1.3.4 Vice-president's name(s) Gary Statdfield

ADDITIONS AND DELETIONS:

The author of this document has added information needed for its completion. The author may also have revised the text of the original AIA standard form. An *Additions and Deletions Report* that notes added information as well as revisions to the standard form text is available from the author and should be reviewed. A vertical line in the left margin of this document indicates where the author has added necessary information and where the author has added to or deleted from the original AIA text.

This document has important legal consequences. Consultation with an attorney is encouraged with respect to its completion or modification.

This form is approved and recommended by the American Institute of Architects (AIA) and The Associated General Contractors of America (AGC) for use in evaluating the qualifications of contractors. No endorsement of the submitting party or verification of the information is made by AIA or AGC.

§ 1.3.5 Secretary's name: Craig Buikema

§ 1.3.6 Treasurer's name: Craig Buikema

§ 1.4 If your organization is a partnership, answer the following:

§ 1.4.1 Date of organization:

§ 1.4.2 Type of partnership (if applicable):

§ 1.4.3 Name(s) of general partner(s)

§ 1.5 If your organization is individually owned, answer the following:

§ 1.5.1 Date of organization:

§ 1.5.2 Name of owner:

§ 1.6 If the form of your organization is other than those listed above, describe it and name the principals:

§ 2 LICENSING

§ 2.1 List jurisdictions and trade categories in which your organization is legally qualified to do business, and indicate registration or license numbers, if applicable.

UA Plumbers, Pipefitters & International Association of Sheet Metal Workers

§ 2.2 List jurisdictions in which your organization's partnership or trade name is filed.

Continental United States

§ 3 EXPERIENCE

§ 3.1 List the categories of work that your organization normally performs with its own forces.

Plumbing, Heating, Sheet Metal, Process Piping

§ 3.2 Claims and Suits. (If the answer to any of the questions below is yes, please attach details.)

§ 3.2.1 Has your organization ever failed to complete any work awarded to it?

No

§ 3.2.2 Are there any judgments, claims, arbitration proceedings or suits pending or outstanding against your organization or its officers?

No

§ 3.2.3 Has your organization filed any law suits or requested arbitration with regard to construction contracts within the last five years?

No

§ 3.3 Within the last five years, has any officer or principal of your organization ever been an officer or principal of another organization when it failed to complete a construction contract? (If the answer is yes, please attach details.)

No

§ 3.4 On a separate sheet, list major construction projects your organization has in progress, giving the name of project, owner, architect, contract amount, percent complete and scheduled completion date. See Attached

§ 3.4.1 State total worth of work in progress and under contract:

See Attached

§ 3.5 On a separate sheet, list the major projects your organization has completed in the past five years, giving the name of project, owner, architect, contract amount, date of completion and percentage of the cost of the work performed with your own forces.

See Attached

§ 3.5.1 State average annual amount of construction work performed during the past five years:

\$200,000,000

§ 3.6 On a separate sheet, list the construction experience and present commitments of the key individuals of your organization.

See Attached

§ 4 REFERENCES

§ 4.1 Trade References:	Columbia Pipe & Supply 815-773-1920	Ferguson Enterprises 630-932-3865	Porter Pipe & Supply 630-725-8381
--------------------------------	--	--------------------------------------	--------------------------------------

§ 4.2 Bank References: BMO Harris Bank
Patrick Weberpal
608-755-4229

§ 4.3 Surety:

§ 4.3.1 Name of bonding company: Fidelity & Deposit of Maryland (Subsidiary of Zurich)

§ 4.3.2 Name and address of agent: Williams Manny
555 S. Perryville
Rockford IL 61125
Judy Zier - 815-226-3220

§ 5 FINANCING

§ 5.1 Financial Statement.

§ 5.1.1 Attach a financial statement, preferably audited, including your organization's latest balance sheet and income statement showing the following items: **See Attached Financial Letter - we will submit a financial statement upon request.**

Current Assets (e.g., cash, joint venture accounts, accounts receivable, notes receivable, accrued income, deposits, materials inventory and prepaid expenses);

Net Fixed Assets;

Other Assets;

Current Liabilities (e.g., accounts payable, notes payable, accrued expenses, provision for income taxes, advances, accrued salaries and accrued payroll taxes);

Other Liabilities (e.g., capital, capital stock, authorized and outstanding shares par values, earned surplus and retained earnings).

§ 5.1.2 Name and address of firm preparing attached financial statement, and date thereof:

§ 5.1.3 Is the attached financial statement for the identical organization named on page one?

§ 5.1.4 If not, explain the relationship and financial responsibility of the organization whose financial statement is provided (e.g., parent-subsiary).

§ 5.2 Will the organization whose financial statement is attached act as guarantor of the contract for construction?

Yes

§ 6 SIGNATURE

§ 6.1 Dated at this 3 day of September, 2024

Name of Organization: Helm Mechanical

By:

Title: Vice President

§ 6.2

M being duly sworn deposes and says that the information provided herein is true and sufficiently complete so as not to be misleading.

Subscribed and sworn before me this 3 day of September, 2024

Notary Public:

My Commission Expires: 10/05/2024





CONSTRUCTION PROJECTS REFERENCES

PROJECT	JOB #	CONTRACT AMOUNT	OWNER/GE/CM	ARCHITECT	JOB DESCRIPTION	Bonded
MERCY HEALTH RIVERSIDE CAMPUS ROCKFORD, IL 2017-2019 PM: KYLE DEWALL	2179	\$ 60,000,000.00	M.A. MORTENSON 25 NW PAOINT BLVD 100 ELK GROVE VILLAGE IL 60007 JOE KRUEGER 847-472-8131	AECOM COLUMBUS OH CASEY OLIDHAM 614-464-4500	HVAC & PLUMBING	No
ADVOCATE GOOD SHEPHERD HOSPITAL BED TOWER BARRINGTON, IL 2014-6/1/17 PM: KYLE DEWALL	2010	\$ 30,000,000.00	M.A. MORTENSON 25 NW PAOINT BLVD 100 ELK GROVE VILLAGE IL 60007 TOM SIMON 847-472-8165 tom.simon@mortenson.com	HOK ARCHITECTS 60 EST VAN BUREN STREET CHICAGO IL 60605	HVAC	Yes
NW UNIVERSITY KELLOGG SCHOOL OF MGMT CHICAGO, IL 2014-10/26/16 PM: TED MORA	2069	\$ 43,000,000.00	POWER CONSTRUCTION 2360 PALMER DRIVE SCHAUMBURG IL 60173 CHRIS ERICKSON 847-214-6758 cefrickson@pcec.net	KRMB ARCHITECTS 322 KING STREET WEST TORONTO ONTARIO 416-977-5104	HVAC & PLUMBING	No
HINES VA HOSPITAL HINES, IL 2016-2019 PM - TED MORA	2175	\$ 12,650,000.00	WALSH CONSTRUCTION 929 W ADAMS STREET CHICAGO IL BRYAN MERRILL 312-563-5400	HGA ARCHITECTS 414-278-8200	HVAC & PLUMBING	Yes
OSF BED TOWER ROCKFORD, IL 2016-12/27/17 PM: MIKE WILLIAMS	2153	\$ 13,500,000.00	RINGLAND JOHNSON CHERRY VALLEY, IL BRENT JOHNSON 815-332-8620 bjohnson@rnlnd.com	HKS INC CHICAGO IL 312-346-5899	HVAC & PLUMBING	Yes
NIMH KISHWAUKEE HEALTH & FITNESS DEKALB, IL 2017-2018 PM: BILL HOFFMAN	2171	\$ 3,200,000.00	POWER CONSTRUCTION CHICAGO IL AARON MOE 312-596-6960	PLUNKETT RAVSICH ARCHITECTS MILWAUKEE WI 414-359-3060	HVAC	No
NW LAKE FOREST HOSPITAL LAKE FOREST, IL 2015-6/14/17 PM: RYAN BLACKMAN	2087	\$ 15,200,000.00	TURNER CONSTRUCTION PETE WOESTE 312-327-2784 pdwoeste@lccgo.com	GENSLER CHICAGO IL 312-456-0123	HVAC	No
CSL BEHRING B33/34 BRADLEY IL 2015-2017 PM: SHANE FLYNN	2114	\$ 27,000,000.00	CSL BEHRING STEVE WROBLEWSKI 815-935-3153 steve.wroblewski@csbehring.com	FLUOR	PIPE	No
MCCORMICK PLAGE CUP CHICAGO IL 2016-7/31/18 PM: KEVIN CURENT	2138	\$ 10,500,000.00	CLARK/BULLEY JV Archie Gallup 617-548-0298	AFFILIATED ENGINEERS INC CHICAGO IL 312-977-2800	HVAC	YES
MCCORMICK EVENT CENTER CHICAGO IL 2015-2017 PM: TONY DIVITO	2116	\$ 3,360,000.00	CLARK/BULLEY JV MIKE MOORE 312-258-5459	MOODY NOLAN ARCHITECTS CHICAGO IL 312-929-2516	PLUMBING	Yes



SCHOOL PROJECTS

Helm Mechanical
2279 US 20 East
Freeport IL 61032
Ph: 815-235-1955
Fax: 815-235-1940

PROJECT	JOB #	CONTRACT AMOUNT	OWNER/GC/CONSTRUCTION MGR	ARCHITECT	JOB DESCRIPTION
ROCK VALLEY COLLEGE HEALTH & SCIENCE ROCKFORD, IL COMPLETE 2017	2131	\$ 6,500,000.00	JP CULLEN & SONS 330 EAST DELAVAN DRIVE JANESVILLE WI 53546 NEAL DAY 608-754-6601	BLDD ARCHITECTS 833 WEST JACKSON STREET CHICAGO IL 60607	HVAC
NEW HINSDALE MIDDLE SCHOOL HINSDALE, IL 2017-2018	2203	\$ 3,604,500.00	BULLEY & ANDREWS 1755 W ARMITTAGE AVENUE CHICAGO IL 60622 JOE MURRAY 312-507-9138	CORDOGAN CLARK & ASSOCIATES 960 RIDGEWAY AVENUE AURORA IL 60506	HVAC
NEW TRIER HIGH SCHOOL MECHANICAL RENOV WINNETKA COMPLETE 2017	2190	\$ 2,650,000.00	NEW TRIER CUSD #203 385 WINNETKA AVENUE WINNETKA IL 847-446-7000 STEVE LINK	CASHMAN STAHLER GROUP 1910 S HIGHLAND AVENUE STE 310 LOMBARD IL 60148 630-889-8800 STEPHAN CASHMAN scashman@cashmanstahler.com	HVAC
NEW TRIER WINNETKA & NORTHFIELD CAMPUS WINNETKA & NORTHFIELD IL COMPLETE 2017	2136	\$ 2,000,000.00	NEW TRIER CUSD #203 385 WINNETKA AVENUE WINNETKA IL 847-446-7000 STEVE LINK	CASHMAN STAHLER GROUP 1910 S HIGHLAND AVENUE STE 310 LOMBARD IL 60148 630-889-8800 STEPHAN CASHMAN scashman@cashmanstahler.com	HVAC
FLINN MIDDLE SCHOOL ROCKFORD, IL COMPLETE 2018	2232	\$ 1,600,000.00	ROCKFORD CUSD #205 501 7TH STREET ROCKFORD IL 61104 815-966-3000	LARSON & DARBY 4949 HARRISON AVENUE ROCKFORD IL 61108 815-633-1773 RAED SALEEM rsaleem@larsondarby.com	HVAC
DIXON HIGH SCHOOL RENOVATION DIXON IL COMPLETE 2019	2227	\$ 4,500,000.00	Dixon CUSD #170 1335 Franklin Grove Road Dixon IL 61021	Green Associates 111 Deer Lake Road Davenport IA 52807 847-317-0852 George Reigle	HVAC & PLBG

[illegible]



BRIAN HELM, P.E.

CEO and President

EDUCATION

Georgia Tech University

M.S. Civil Engineering

Duke University

B.S. Civil Engineering

WORK EXPERIENCE

Helm

CEO and President

2001 - Present

Civil Constructors

Project Manager

1999 - 2001

Kiewit Construction

Field Engineer / Job Superintendent

1995 - 1999

ASSOCIATIONS

MCAA

- President, 2019 - 2021
- Executive Committee
- Board Member
- Education Board, Past Chair
- Technology Board, Past Chair

MCA Chicago

- President, 2018 - 2020
- Board Member

Local 597, JATC, Past Chair

Local 23, JATC, Past Chair

Piping Council of Rockford

- Board and Past President

Industrial Relations UA Council

YPO Member

COMMUNITY ACTIVITIES

Board of Directors

- Northern Illinois Development Alliance
- Greater Freeport Partnership
- Rock Valley College Foundation
- YMCA of Northwest Illinois

LICENSES AND CERTIFICATIONS

Registered Professional Engineer - Illinois

OSHA 30 Hour

Red Cross First Aid/CPR, EIT



Helm



CHRIS LORING

Corporate Safety Director

EDUCATION

Illinois State University

B.S. Communications & Public Relations

WORK EXPERIENCE

Helm Group

Corporate Safety Director

2007 - Present

Honeywell

Senior HSE Specialist

2003 - 2007

Honeywell

Factory Supervisor

2000 - 2003

Goodyear

Area Manager

1997 - 2000

ADDITIONAL EDUCATION & CERTIFICATIONS

Mental Health First Aid Certification – National Council for Behavioral Health – March 2021

ASSE Certification to the Series 12020 Health and Safety Standard – April 2020

Defensive Driver Instructor Course – NSC – July 2019

NFPA Instructor Trainer Course – NFPA/MCAA - June 2019

OSHA 502: Update for Trainers in Construction - 2011, 2015, and April 2019

Trench Safety Conference – OSHA – April 2019 and November 2020

Part 46 - Annual Certification: MSHA – February 2019

Safety Directors Conference – MCAA – 2008, 2018, 2019, 2020, 2021

Competent Person for Fall Protection (Military) – MSA – May 2018

First Aid, CPR & AED Instructor – National Safety Council – August 2017

Construction Health and Safety Technician (CHST) – BCSP – September 2016

Safety Training Methods – National Safety Council – February 2016

Certified Trainer – Boom Lift and Scissor Lift – January 2016

Circuit Court of Stephenson County: Jury Service – December 2015

Lead Renovation Refresher: MidWest Certified Training, Inc. – April 2015

CPR/First Aid/AED Certified: Red Cross – March 2015

The Complete Guide to HR Management – October 2013

The Reid Technique of Interviewing and Interrogation – January 2013

Fall Prevention and Protection Inspection Training – November 2012

Health Hazards in Construction: OSHA – August 2011

Lead Safety for Renovation: Occupational Training and Supply Inc. – April 2010

Powered Industrial Truck Train the Trainer: National Safety Council – January 2010

Safety and Risk Management Academy: Iowa State University – September 2009

Crane & Hoist Train the Trainer: National Safety Council – January 2008

OSHA 500: OSHA Trainer Course for Construction – September 2007

OSHA 510: OSHA Standards for Construction Industry – August 2007

OSHA VPP Star Certification: Honeywell Control Products – March 2006

AIHA: Fundamentals of Industrial Hygiene – July 2005

OSHA 511: Standards for General Industry – February 2004

Six Sigma Green Belt: Honeywell Control Products – June 2002

ASSOCIATIONS

National Council for Behavior Health – MHFA Certified

American Society of Inspectors of Plumbing and Sanitary Engineers – Series 12020 Certified

Board of Certified Safety Professionals – Member

United Academy – Certified Training Instructor

OSHA Training Institute Education Center – Training Instructor

Sheet Metal and Air Conditioning Contractors National Association (SMACNA)

Mechanical Contractors Association of America (MCAA) - Member

American Society of Safety Engineers (ASSE) – Member

National Safety Council – Member/Certified Training Instructor

Society for Human Resources Management - Member

Northern Illinois Building Contractors Association (NIBCA) - Member

Stephenson County Health Department – Emergency Response Volunteer

Freeport YMCA, Little League – Volunteer/Youth Flag Football, Soccer, Baseball Coach

Boy Scouts of America – Merit Badge Counselor

United States Junior Chamber of Commerce (JAYCEES) – Freeport Chapter - Past President

Public Relations Student Society of America – Illinois State University – Past Board Member



David Schramm

Vice President



EDUCATION

Northern Illinois University
B.S. Mechanical Engineering

ASSOCIATIONS

MCAA National
MCA - Chicago

WORK EXPERIENCE

Helm Mechanical <i>Vice President</i>	<i>April 2020 - Present</i>
Amber Mechanical Contractors <i>Engineering Mgr. / Business Development</i>	<i>2013-2020</i>
F.E. Moran <i>Project Executive</i>	<i>*2011-2013</i>
International Piping Systems <i>Project Manager</i>	<i>2009-2011*</i>
Metro Design Associates <i>Mechanical Engineer</i>	<i>2007 - 2009</i>

RECENT PROJECT EXPERIENCE

The Hayden West Loop	Chicago, IL
Lathrop Homes Phase 1	Chicago, IL
Fannie Emmanuel Senior Housing	Chicago, IL

LICENSES/CERTIFICATIONS

Licensed Professional Engineer
- IL # 062.067338
LEED Accredited Professional
***Merger – International Piping Systems**
and F.E. Moran June 2011



Helm Mechanical
Helm Service
2279 Yellow Creek Road
PO Box 690
Freeport, IL 61032

Tel 815 235 1955
Fax 815 235 1940

To Whom It May Concern:

It is our understanding that certain financial information has been requested about Helm Mechanical/Helm Service as part of the bid package / prequalification information we are preparing for your organization. Helm Mechanical/Helm Service is a wholly owned subsidiary of the Helm Group, Inc. and represents approximately 75% of the revenue of the Helm Group, Inc.

An audited consolidated financial statement is prepared for the Helm Group and subsidiaries after each calendar year end. A separate audited financial statement is not prepared for Helm Mechanical/Helm Service as a stand alone entity. Below are some financial highlights for the past few years.

Helm Mechanical / Helm Service. (alone):

2015 Revenue	\$185,782,982
2016 Revenue	\$225,669,427
2017 Revenue	\$252,714,184
2018 Revenue	\$233,858,778
2019 Revenue	\$203,327,455
2020 Revenue	\$251,145,004
2021 Revenue	\$297,436,639

Helm Group, Inc. (total consolidated, all subsidiaries):

2015 Revenue	\$250,119,498
2016 Revenue	\$294,072,741
2017 Revenue	\$306,358,643
2018 Revenue	\$303,914,530
2019 Revenue	\$269,555,128
2020 Revenue	\$343,113,270
2021 Revenue	\$389,035,371

Helm Group, Inc. (total consolidated, all subsidiaries):

As of December 31, 2021:

Total assets	\$144,097,955
Total current assets	\$109,240,499
Total liabilities	\$ 72,802,258
Total current liabilities	\$ 65,825,882
Total equity	\$ 71,295,697

Available line of credit with bank \$ 30,000,000

Specific financial questions and reference requests can be directed to Craig Buikema, CFO, at 815-297-8690.

Thank you,

HELM MECHANICAL / HELM SERVICE
2279 Yellow Creek Rd.
Freeport, IL 61032

Cottingham & Butler

September 28, 2023

To Whom It May Concern

RE: Historical NCCI Experience Modification Factors

This letter is to confirm the Workers Compensation experience modification history for Helm Group/Civil Constructors, Inc./Mechanical, Inc. is as follows:

04/01/2002	0.55
04/01/2003	0.59
04/01/2004	0.57
06/25/2005	0.69
06/25/2006	0.70
06/25/2007	0.78
10/01/2008	0.76
10/01/2009	0.75
10/01/2010	0.61
10/01/2011	0.60
10/01/2012	0.52
10/01/2013	0.53
10/01/2014	0.47
10/01/2015	0.46
10/01/2016	0.48
10/01/2017	0.52
10/01/2018	0.48
10/01/2019	0.48
10/01/2020	0.52
10/01/2021	0.62
10/01/2022	0.62
10/01/2023	0.66

Please feel free to contact me if you have questions or require any further detail.

Sincerely,



Robert P. Wuebker, CPCU, CIC, CRM, AU, AAI
Account Executive, Risk Management Practice
C&B Insurance
563-587-5306

ab/rpw

