

Board of Commissioners

Dirk Rohne – Chairman
Robert Stevens – Vice-Chair
Frank Spence – Secretary
James Campbell – Treasurer
Scott McClaine – Assistant Secretary/Treasurer

422 Gateway Ave, Suite 100
Astoria, OR 97103
Phone: (503) 741-3300
Fax: (503) 741-3345
www.portofastoria.com

Regular Session

February 7, 2023 @ 4:00 PM
10 Pier 1, Suite 209, Astoria, OR*

The meeting location is accessible to persons with disabilities. A request for an interpreter for the hearing impaired or for other accommodations for persons with disabilities should be made at least 48 hours before the meeting by calling the Port of Astoria at (503) 741-3300.

*This meeting will also be accessible via Zoom. Please see page 2 for login instructions.

Agenda

1. CALL TO ORDER
2. ROLL CALL
3. PLEDGE OF ALLEGIANCE
4. COMMISSION REPORTS
5. CHANGES/ADDITIONS TO THE AGENDA
6. PUBLIC COMMENT – for items on the agenda, when not covered by a public hearing
This is an opportunity to speak to the Commission for 3 minutes regarding any item on the agenda.
Public comment received by the deadline will be read aloud at the meeting.
7. CONSENT CALENDAR:
 - a. Meeting Minutes –
 - Finance Committee Meeting Minutes 12/14/2022 3
 - b. Financials – December 2022 6
 - c. Event Calendar – February 2023 12
8. ACTION:
 - a. Pier 2 West Rehabilitation – Intent to Award..... 13
 - b. Real Estate and Leasing Agent – Intent to Award 108
9. PUBLIC COMMENT – for non-agenda items
This is an opportunity to speak to the Commission for 3 minutes regarding Port concerns not on the agenda. Public comment received by the deadline will be read aloud during the meeting.
10. EXECUTIVE DIRECTOR COMMENTS
11. UPCOMING MEETING DATES:
 - a. Workshop Session – February 21, 2023 at 4:00 PM
 - b. Regular Session – March 7, 2023 at 4:00 PM
12. ADJOURN

Please Note:

Agenda packets are available online at: <https://www.portofastoria.com/CommissionMeetings/AgendaMinutes.aspx>

Please allow time for the normal posting procedure for agendas and meeting packets.

Board of Commissioners
HOW TO JOIN THE ZOOM MEETING:

Online: Direct link: <https://us02web.zoom.us/j/86905881635?pwd=amhtTTBFcE9NUElxNy9hYTFPQTlzQT09>
Or go to [Zoom.us/join](https://zoom.us/join) and enter Meeting ID: 869 0588 1635, Passcode: 422

Dial In: (669) 900-6833, Meeting ID: 869 0588 1635, Passcode: 422

This meeting is accessible to persons with disabilities or persons who wish to attend but do not have computer access or cell phone access. If you require special accommodations, please contact the Port of Astoria at least 48 hours prior to the meeting by calling [\(503\) 741-3300](tel:5037413300) or via email at admin@portofastoria.com.

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**MEETING MINUTES
DECEMBER 14, 2022**

PORT OF ASTORIA
FINANCE ADVISORY COMMITTEE MEETING
PIER ONE BUILDING
#10 PIER 1, SUITE 209
ASTORIA, OR 97103

Call to Order:

The meeting was called to order at 12:15 PM by John Lansing, Finance Committee Chairman.

Roll Call:

Committee Members Present: John Lansing; David Oser; Cliff Fick; Mindy Landwehr; Walt Postlewait; Commissioner Jim Campbell; and Finance, HR & Business Services Manager Melanie Howard.

Commissioners Present: Robert Stevens and Frank Spence*. Dirk Rohne and Scott McClaine were not present for this meeting. *Commissioner Spence joined the meeting at 12:30 pm.

Staff Present: Executive Director Will Isom.

Also Attending: Steve Kraske of the Budget Committee.

Chairman Lansing thanks the Finance Committee members for their efforts this year. The committee has done a good job listening, learning, and asking questions about how the Port, as an organization, addresses issues. Melanie Howard, Finance HR, & Business Services Manager, has done an exceptional job with financial reporting. Lansing comments that December is a time to build relationships with the new administration in Salem and newly elected officials at the city and county levels for the coming year.

Presentation of FY22 Operating Report – Melanie Howard

Finance, HR & Business Services Manager Melanie Howard discusses the Year End Summary Report. Howard prepared this report to focus on the financial performance and health of the Port. Presentation highlights include:

- Howard refers to the Reconciliation of Audited and Budgetary Statements on page five of the Year-End Summary report. The report explains that the information in the Audited Financial Statements varies slightly from the monthly Commission reports. The report reconciles the monthly Commission reports and the Audited Financial Statements.
- Mid-year financial reports are done on a modified accrual basis which accounts for the information to look different than the Audited Financial Statements.
- Committee member David Oser inquires as to the amount of unrestricted operating funds the Port has. Isom explains that in terms of restricted funds, most of the funds of the Port are operating funds. Internally the Port earmarks funds, but they are not restricted funds. Oser suggests adding information in the report to show which funds are earmarked to clarify available cash reserves.
- Howard continues to the Performance Summaries on page ten of the report. Revenues are up across all revenue centers except for Piers, which can be attributed to the Harbor Fee loss.
- Operating changes are broken out year-over-year. Howard notes that the Landside General's increased revenue is attributed to the Airport Industrial Park tenant, The Scoular Company. The graph on page 13 shows Property Revenue trends for the last four years.
- Page 14 shows the cruise dockage impact for the 2022 spring cruise ship season. Cruise ship income has increased \$451,000 year-over-year. Oser inquires if the Cruise agents have pushed back from

the bundled fee structure now in place. Isom explains that the cruise agents initiated a standardized rate several years ago so they would know what fees to expect. This has translated to increased revenues for the Port. Postlewait notes that the consumer appreciates having a set price for budgeting. Committee member Bill Young notes that the community relies on the Port cruise calendar to plan for their businesses, and the calendar is not reliable. Isom explains that Terminal & Customer Support Manager, Susan Transue, updates the calendar as soon as the Port is notified about a ship cancellation. The issue is that there has been a lot of uncertainty from the cruise lines, and there have been a lot of late cancellations. The Port is discussing a greater cancellation fee. Currently, there is no difference in penalty between canceling months out or days out; there is no financial incentive for the cruise lines to cancel early. Before COVID, cancellations were minimal and weather-related. The loss of revenue due to late cancellations has been tough for the Port and the community. The Port is discussing an increase to the cancellation fee in relation to the date of cancellation. Postlewait inquires what the industry standard is for cancellation policies; the Port should adopt policies to be in line with other Ports. Isom answers that there is nothing uniform for West Coast Port fee and cancellation policies. Postlewait suggests that Susan Transue have quarterly meetings with her counterparts at the Ports to discuss this issue.

- Marina income has increased \$24,000 year-over-year and boatyard income has increased by \$167,000 year-over-year.
- Oser notes that the unrestricted net position has declined by roughly three million dollars over the last three years and inquires if this is worrisome for the Port. Isom explains that the last several years have been a general contraction of the Port's revenues. As the Port moves forward, the groundwork has been made in terms of planning and streamlining processes. There will be a shift to a period of growth and increased revenues. Isom has spent a lot of time this past year laying the groundwork. The next phase will be actively and aggressively pursuing funding. The Port has assets across the board that are in need of investment, and maintaining infrastructure has been a considerable cost to the Port.
- Commissioner Campbell inquires as to the financial effect of The Scouler Company lease on the Airport Industrial Park. Howard explains that the base rent began at \$2,000.00 per month in 2021, increased to \$4,000.00 per month in 2022, and includes escalation and rate increases throughout the lease period.

Discuss RFP for development of East Mooring Basin

Executive Director Isom explains that the East Mooring Basin (EMB) is a unique asset. Isom has met with a number of groups interested in the development of the EMB. The Port has a lot of projects in progress, and Port leadership has spent considerable time laying the groundwork for things to come. Isom will be spending considerable time this year actively pursuing funding. Port grant writer, Shane Jensen, received feedback from Business Oregon that the Port needs to tell a story. The grant agencies are interested in how grant funding will affect the region. The Port must be clear in its priorities, and the top priority is Pier 2. Isom has concerns that it may not be the best time to move forward with the EMB. The Port has a responsibility to think of the community's long-term needs. Discussion highlights include:

- Commissioner Campbell notes that the breakwater was recently rebuilt by the Army Corps of Engineers.
- Committee member Lansing comments that the EMB is not being utilized and putting pressure on the federal government to show that the causeway could be a foundation for 1800 slips, many of which would be small businesses.
- Postlewait comments that Isom and his leadership team have done a phenomenal job in the past several years. Postlewait suggests that the Port articulate what we are looking for and to look for a public-private partnership. Postlewait suggests an ad hoc committee to figure out what the needs of the community are and build an RFP around those needs.

- Isom comments that last week he met with Jim Maul, previously of the engineering firm Maul Foster & Alongi, and discussed grant opportunities. Environmental effects and job creation are two major aspects granting agencies consider. Isom and Maul discussed the idea of packaging infrastructure needs for one large grant request.
- Fick inquires how the EMB is generating lease revenue. Isom explains that the income is generated from Waterfront East and not specifically the East Mooring Basin, which includes the Riverwalk Inn.
- Commissioner Stevens suggests that the Finance Committee add cargo opportunities for the Port to the next meeting agenda.

Adjourn

Agenda items five through seven will be discussed at the next Finance Committee Meeting. Chairman Lansing adjourned the meeting at 1:47 PM.

APPROVED:**ATTEST:**

Dirk Rohne, Board Chairman
Board of Commissioners

Frank Spence, Secretary
Board of Commissioners

Respectfully submitted by:
Stacy Bandy
Executive Assistant/Administrative Coordinator

February 7, 2023
Date Approved by Commission



DECEMBER 2022 FINANCIALS NARRATIVE

For July through December 2022, the Port is showing an operating gain of \$272,268. This operating gain is trailing prior-year profits by \$208,775 and is \$505,465 below budget projections. Operating revenue YTD is at 90% and operating expense is at 100% of seasonally trended budget. Non-operating income is at 100% and non-operating expense is 65% of budget. Total net income YTD is \$272,268, which is \$242,846 ahead of budget expectations.

The budget and prior-year deficits for dockage are \$(325,204) and \$(178,123), respectively. For the year-to-date budget, \$193,602 had been included for estimated Harbor Fee income; the total FY23 budgeted amount for Harbor Fee income is \$380,000, none of which is expected to be collected. Looking at the prior-year differences, for July and December of 2021 the Port had billed for \$198,900 of Harbor Fee income.

Lease and rental income was \$251,722 less than budgeted, primarily as a result of a partial deferment of the Bornstein warehouse loan; the decrease in income will be offset by a decrease to debt service.

Gross Marina revenues were roughly 97% of budget and prior year with Boatyard gross revenues at roughly 122% of budget and prior year. Net profits from fuel sales were up \$72,931 from prior year.

Personnel services came in \$86,368 under budget while materials and services were \$75,782 over budget.

Looking at non-operating totals, debt service expense is \$751,659 below budget, as a result of a new debt deferment agreement with Business Oregon. Capital spending in December was primarily for boatyard stands, West Marina dredging, West Basin pile replacements, and Airport master plan projects.

Fuel Sales Summary:

Marina Fuel	Unleaded Sales \$	Unleaded Sales Gal	Unleaded COGS	Unleaded Profit	Diesel Sales \$	Diesel Sales Gal	Diesel COGS	Diesel Profit
Jul - Dec 2022	\$ 438,601	64,033	\$ 311,070	\$ 127,531	\$ 171,657	31,459	\$ 118,127	\$ 53,530
Jul - Dec 2021	\$ 397,878	73,159	\$ 261,916	\$ 135,962	\$ 134,477	38,600	\$ 86,278	\$ 48,199
Airport Fuel	Jet A Sales \$	Jet A Sales Gal	Jet A COGS	Jet A Profit	100LL Sales \$	100LL Sales Gal	100LL COGS	100LL Profit
Jul - Dec 2022	\$ 541,472	96,100	\$ 384,510	\$ 156,962	\$ 93,926	13,930	\$ 73,145	\$ 20,781
Jul - Dec 2021	\$ 273,396	69,966	\$ 180,476	\$ 92,920	\$ 46,154	9,213	\$ 37,362	\$ 8,792

Port of Astoria
Profit & Loss Actual vs. Budget
December 2022

	Actuals Jul 2022 - Dec 2022	Actuals Jul 2021 - Dec 2021	Budget Jul 2022 - Dec 2023	Budget Variance Through Dec	% of Budget Through Dec	Full '22-'23 Budget
<u>Operating Revenues</u>						
Dockage & Vessel Service	368,306	693,510	546,429	-178,123	67%	1,226,657
Lease & Rental Income	1,293,023	1,087,724	1,544,745	-251,722	84%	3,118,224
Rebilled Expenses	948,979	813,660	993,522	-44,543	96%	1,713,380
Boat Haulout	358,601	287,435	293,184	65,417	122%	665,527
Marina Revenues	354,776	361,721	365,854	-11,078	97%	680,780
Fuel Sales	1,245,656	851,905	1,284,096	-38,440	97%	1,882,280
Ticket Revenues	2,145	4,660	7,360	-5,215	29%	9,540
Other Income	22,875	71,918	75,223	-52,347	30%	148,266
Total Operating Revenues	4,594,363	4,172,533	5,110,413	-516,051	90%	9,444,654
<u>Operating Expenses</u>						
Personnel Services	1,337,493	1,253,226	1,423,861	-86,368	94%	2,820,490
Materials and Services	2,743,220	2,196,883	2,667,438	75,782	103%	4,481,686
Total Operating Expenses	4,080,713	3,450,108	4,091,298	-10,585	100%	7,302,176
Income from Operations	513,649	722,424	1,019,115	-505,465	50%	2,142,478
<u>Non-Operating Revenues</u>						
Property Tax Revenues-Genl Fund	859,267	795,804	817,762	41,505	105%	890,248
Timber Tax Revenues	46,385	41,827	46,385	0	100%	198,811
Other County Revenues	128	36,045	37,869	-37,741	0%	39,500
Grants*	240,160	1,940,564	240,160	0	100%	1,940,763
Interest Income	2,538	1,029	9,650	-7,112	26%	18,303
Total Non-Operating Revenues	1,148,478	2,816,481	1,151,826	-3,348	100%	3,087,625
<u>Total Non-Operating Expenses</u>						
Capital Outlay*	1,122,800	2,754,889	1,122,800	0	100%	3,959,368
Interest Expense	90,395	41,889	311,455	-221,059	29%	474,936
Principal Expense	176,664	45,796	707,264	-530,600	25%	1,135,728
Total Non-Operating Expenses	1,389,859	2,842,573	2,141,518	-751,659	65%	5,570,032
Net Income (Loss)	272,268	696,332	29,423	242,846	925%	-339,929

*Capital Outlay/Grants year-to-date budget set to match Revenue/Expense, not seasonally adjusted.

Port of Astoria

Balance Sheet as of December 2022

	<u>December 31, 2022</u>
ASSETS	
Current Assets	
Cash & Cash Equivalents	
Cash Funds	745
Operating Account #1442	1,738,773
Payroll Account #5344	25,121
Bornstein MMA #0004	63,325
Money Market #1259	262,542
Total Lewis & Clark Bank	<u>2,089,760</u>
Total Cash & Cash Equivalents	2,090,505
Accounts Receivable	356,570
Other Current Assets	2,603,558
Total Current Assets	<u>5,050,633</u>
Fixed Assets	35,731,756
Other Assets	
Long-term Receivables	<u>18,015,648</u>
TOTAL ASSETS	<u><u>58,798,037</u></u>
LIABILITIES & EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	655,395
Other Current Liabilities	15,877,729
Total Current Liabilities	<u>16,533,124</u>
Long Term Liabilities	
Accrued Vacation Payable	142,253
Accrued Sick Leave	158,204
Notes Payable	13,785,573
Net Pension Liability	829,427
Lease Liability	725,809
OPEB Liability	85,017
Pollution Remediation AOC 4 Liability	2,966,175
Less Current Portion LT Debt	-963,782
Total Long Term Liabilities	<u>17,728,678</u>
Total Liabilities	34,261,802
Equity	
Retained Earnings	24,263,967
Net Income	272,268
Total Equity	<u>24,536,236</u>
TOTAL LIABILITIES & EQUITY	<u><u>58,798,037</u></u>

Prepared by: Melanie Howard



Capital Projects
December 2022
Budget to Actual

DEPARTMENT AND PROJECT		CAPITAL PROJECTS & GRANTS As Budgeted			CAPITAL PROJECTS & GRANTS Actual Spending To-Date			REMAINDER & PRIORITY	
		Adopted Capital Expenditure	Adopted Grant Funding	Adopted POA Expense	Expenses through 12/31/2022	Grants Received through 12/31/2022	Expenses through 12/31/2022 NET OF GRANTS	Budgetary Estimate of Remaining POA Expense	Priority (1-10) 9=Comp 10=Remvd
Department	Description								
WFW	P2 West PS&E Documents; CM/GC work to 100% Design	250,000	-	250,000	2,333	-	2,333	247,667	1
Airport	Airport Master Plan	389,253	361,163	28,090	244,834	239,328	5,505	22,585	2
WFE - Marinas	West Marina Dredging	496,250	-	496,250	167,900	-	167,900	328,350	2
WFE - Marinas	West Marina Piling Replacement (25)	133,500	-	133,500	248,053	-	248,053	(114,553)	2
Administration	2022-23 IT Upgrades	30,000	-	30,000	20,133	-	20,133	9,867	3
Airport	Backfill and Site Prep Behind Overbay	30,000	-	30,000	2,650	-	2,650	27,350	3
Airport	Backfill and Site Prep Behind Recology	55,000	-	55,000	14,838	-	14,838	40,162	3
WFW	Fender Pile Replacement (25) Pier 1 West, Pier 2 East, Pier 2 West	221,875	-	221,875	83,437	-	83,437	138,438	3
WFW	Security Upgrades: Trident equipment; Pier 1 Generator; Pier 1 Booth; Cyber Security	200,000	150,000	50,000	2,200	-	2,200	47,800	3
Airport	Hangar Maintenance	50,000	-	50,000	-	-	-	50,000	4
WFW	Pier 2 East - Repairs based on ODOT reports	50,000	-	50,000	1,762	-	1,762	48,238	4
Airport	T-Hangar Fencing	50,000	37,500	12,500	2,189	-	2,189	10,311	4
Airport	Vegetation Management	30,000	-	30,000	16,315	-	16,315	13,685	4
WFW - Boatyard	Boatyard Electrical Upgrades	10,000	-	10,000	7,030	-	7,030	2,970	5
WFW - Boatyard	Boatyard Upgrades	650,000	455,000	195,000	136	-	136	194,864	5
WFW	Fire suppression/system upgrades - Pier 2	20,000	-	20,000	-	-	-	20,000	5
Airport	Gator Utility Vehicle	15,000	-	15,000	-	-	-	15,000	5
Airport	Industrial Park	250,000	225,000	25,000	500	-	500	24,500	5
WFE	Maintenance - Flatbed Truck	13,500	-	13,500	-	-	-	13,500	5
WFW	Maintenance - Flatbed Truck	31,500	-	31,500	-	-	-	31,500	5
WFW	Repave Gateway Avenue / Restripe	110,000	110,000	-	-	-	-	-	5
WFW	Replace Cruise Ship Gangway Decking	15,000	-	15,000	-	-	-	15,000	5
Airport	Terminal Building Upgrades	150,000	142,500	7,500	3,100	-	3,100	4,400	5
Airport	Tide Gate Feasibility Study	99,600	99,600	-	2,894	-	2,894	(2,894)	5
Airport	Utility Trailer	7,500	-	7,500	-	-	-	7,500	5
WFE - Marinas	East Mooring Basin Causeway Design & Repairs	500,000	350,000	150,000	-	-	-	150,000	6
WFW - Boatyard	Boatyard Stands	16,390	-	16,390	14,587	-	14,587	1,803	9
Airport	Airport Generator	20,000	10,000	10,000	1,985	832	1,153	8,847	9
WFW	Pier 1 Face Chip Seal	15,000	-	15,000	13,760	-	13,760	1,240	9
WFW	Repave Pier 2 Entrance to Gateway	50,000	-	50,000	41,500	-	41,500	8,500	9
	Misc				230,665	-	230,665	(230,665)	
TOTALS		3,959,368	1,940,763	2,018,605	1,122,800	240,160	882,640	1,135,966	

Port of Astoria
Vouchers Paid -- Operating Acct

Type	Date	Num	Name	Memo	Credit
102-00 · Cash					
102-02 · CCB Operating #1442					
Bill Pmt -Check	01/06/2023	81863	A Coastal Lock & Key, LLC		135.00
Bill Pmt -Check	01/06/2023	81864	ALS Environmental	Cust # 205142-01	1,180.00
Bill Pmt -Check	01/06/2023	81865	Anchor Graphics		270.00
Bill Pmt -Check	01/06/2023	81866	AT&T	Acct # 019 295 1870 001	23.07
Bill Pmt -Check	01/06/2023	81867	Blue Line Courier, LLC		250.00
Bill Pmt -Check	01/06/2023	81868	Card Service Center		3,815.45
Bill Pmt -Check	01/06/2023	81869	CenturyLink	Acct # 497163267	103.94
Bill Pmt -Check	01/06/2023	81870	Charter Business - 0229	8787 14 680 0000229	2,112.00
Bill Pmt -Check	01/06/2023	81871	Charter Business - 5587	Acct # 8787 14 002 0105587	40.58
Bill Pmt -Check	01/06/2023	81872	Charter Business - 5595	Acct # 8787 14 002 0105595	179.97
Bill Pmt -Check	01/06/2023	81873	Cintas Corporation	10829	212.94
Bill Pmt -Check	01/06/2023	81874	City Lumber	Cust # 7259	91.76
Bill Pmt -Check	01/06/2023	81875	Clean Sweep Maintenance, Inc.		345.00
Bill Pmt -Check	01/06/2023	81876	Cummins Sales & Service	254600	495.65
Bill Pmt -Check	01/06/2023	81877	Earthworx Excavation, LLC		7,713.56
Bill Pmt -Check	01/06/2023	81878	EPIC Aviation, LLC - fuel	AST0770GP	22,637.87
Bill Pmt -Check	01/06/2023	81879	Frank Spence, Commissioner	Reimb - Dec 2022	50.00
Bill Pmt -Check	01/06/2023	81880	Harold Culver (Retiree)		264.78
Bill Pmt -Check	01/06/2023	81881	iFocus Consulting, Inc.		365.40
Bill Pmt -Check	01/06/2023	81882	Jackson and Son Oil	Acct # 63045 W/O#2498	10,858.05
Bill Pmt -Check	01/06/2023	81883	James T. Campbell, Commissioner	Commission Mtg Attendance	650.00
Bill Pmt -Check	01/06/2023	81884	Kiwi Glass, Inc.		4,005.00
Bill Pmt -Check	01/06/2023	81885	MarinaWare		890.00
Bill Pmt -Check	01/06/2023	81886	Michael Magyar dba Magyar Land Surveying		9,120.00
Bill Pmt -Check	01/06/2023	81887	North Coast Truck Parts	Acct # 358 W/O#2197	121.50
Bill Pmt -Check	01/06/2023	81888	Northwest Local Government Legal A Nov 2022		2,530.00
Bill Pmt -Check	01/06/2023	81889	NW Natural		2,433.59
Bill Pmt -Check	01/06/2023	81890	OLSEN BAY MARINE SERVICES		1,297.50
Bill Pmt -Check	01/06/2023	81891	Orkin Pest Control	28012851	114.90
Bill Pmt -Check	01/06/2023	81892	P & L Johnson Mechanical, Inc.		381.06
Bill Pmt -Check	01/06/2023	81893	Pacific Coast Congress	2023 Membership renewal	265.00
Bill Pmt -Check	01/06/2023	81894	Pacific Power		15,602.97
Bill Pmt -Check	01/06/2023	81895	PetroCard, Inc.	01-0004280	1,265.33
Bill Pmt -Check	01/06/2023	81896	Platt Electric Supply (Rexel)	Acct #135946	510.51
Bill Pmt -Check	01/06/2023	81897	Recology Western Oregon		3,183.06
Bill Pmt -Check	01/06/2023	81898	Recology Western Oregon (LA)	A1080000232	606.62
Bill Pmt -Check	01/06/2023	81899	S. Bruce Conner	December 2022	2,100.00
Bill Pmt -Check	01/06/2023	81900	Seaside Chamber of Commerce	Membership renewal for 2023	200.00
Bill Pmt -Check	01/06/2023	81901	Shane Jensen - Grant Writer	Grant Writing - Dec 2022	7,698.75
Bill Pmt -Check	01/06/2023	81902	Shred-It	Cust # 16971101	60.00
Bill Pmt -Check	01/06/2023	81903	Special Districts Association of Orego	Executive Director Evaluation	250.00
Bill Pmt -Check	01/06/2023	81904	Spectrio, LLC	Acct # SPX755863	105.00
Bill Pmt -Check	01/06/2023	81905	Standard Insurance Co.	Policy # 00 158620 0001	2,286.70
Bill Pmt -Check	01/06/2023	81906	Staples Advantage		113.10
Bill Pmt -Check	01/06/2023	81907	Sunset Auto Parts - NEW	Cust # 76004	326.69
Bill Pmt -Check	01/06/2023	81908	TKE (Thyssenkrupp Elevator Corp)	Cust # 71259	4,510.00
Bill Pmt -Check	01/06/2023	81909	VenTek International	Cust # PORTASTORIA	380.00
Bill Pmt -Check	01/06/2023	81910	Verizon Wireless #7705-1	270297705-00001	560.98
Bill Pmt -Check	01/06/2023	81911	Walter E. Nelson Co.	Cust # 1629	1,431.90
Total 102-02 · CCB Operating #1442					<u>114,145.18</u>
Total 102-00 · Cash					<u>114,145.18</u>
TOTAL					<u><u>114,145.18</u></u>

JTC 1-6-23
OK

W

Port of Astoria
Vouchers Paid -- Operating Acct

Type	Date	Num	Name	Memo	Credit
102-00 - Cash					
102-02 - CCB Operating #1442					
Bill Pmt -Check	01/20/2023	81912	A Coastal Lock & Key, LLC		34.50
Bill Pmt -Check	01/20/2023	81913	Ameri-Crane Inspection		2,284.00
Bill Pmt -Check	01/20/2023	81914	America's Phone Guys		581.68
Bill Pmt -Check	01/20/2023	81915	Bergerson Construction, Inc		213,707.25
Bill Pmt -Check	01/20/2023	81916	Blue Line Courier, LLC		250.00
Bill Pmt -Check	01/20/2023	81917	Business Credit Reports, Inc.	Cust # 559359	56.00
Bill Pmt -Check	01/20/2023	81918	C-TechSolutions LLC		115.00
Bill Pmt -Check	01/20/2023	81919	Campbell Environmental		2,023.75
Bill Pmt -Check	01/20/2023	81920	Capt Robert Stevens - Commissioner	Reimb for Commission Mtgs	250.00
Bill Pmt -Check	01/20/2023	81921	Cartomation, Inc.		1,000.00
Bill Pmt -Check	01/20/2023	81922	CenturyLink	Acct # 497163267	102.90
Bill Pmt -Check	01/20/2023	81923	Charter Business - 5587	Acct # 8787 14 002 0105587	39.99
Bill Pmt -Check	01/20/2023	81924	City of Astoria - utilities		11,543.76
Bill Pmt -Check	01/20/2023	81925	City of Warrenton		3,034.76
Bill Pmt -Check	01/20/2023	81926	City of Warrenton	Grading and Fill Permit for Overbay Houseworks	377.88
Bill Pmt -Check	01/20/2023	81927	City of Astoria - utilities	Acct # 005175-000 Water Corrected Billings from 8/1/...	13,312.61
Bill Pmt -Check	01/20/2023	81928	City of Astoria - utilities	Acct # 005160-000 Water Corrected Billings from 8/1/...	116,720.21
Bill Pmt -Check	01/20/2023	81929	Coastal Alarm Systems, Inc.	Mon-001	2,121.12
Bill Pmt -Check	01/20/2023	81930	Columbia Steel Supply	W/O#2498	59.66
Bill Pmt -Check	01/20/2023	81931	Dennis Larson Excavating		9,500.00
Bill Pmt -Check	01/20/2023	81932	DSL		9,412.53
Bill Pmt -Check	01/20/2023	81933	Earthworx Excavation, LLC		4,368.75
Bill Pmt -Check	01/20/2023	81934	Englund Marine (Boatyard)		87.57
Bill Pmt -Check	01/20/2023	81935	Englund Marine (Marina)		1,190.69
Bill Pmt -Check	01/20/2023	81936	Englund Marine (MX)		19,948.86
Bill Pmt -Check	01/20/2023	81937	General Utilities Company		630.00
Bill Pmt -Check	01/20/2023	81938	Haglund Kelley LLP		3,112.50
Bill Pmt -Check	01/20/2023	81939	Hamilton Engine, LLC	W/O#2197	910.52
Bill Pmt -Check	01/20/2023	81940	Hauer's Lawn Care & Equip		10.00
Bill Pmt -Check	01/20/2023	81941	HighTide Technologies, LLC	CUS39	480.00
Bill Pmt -Check	01/20/2023	81942	Home Depot	6035 3225 3191 4798	470.66
Bill Pmt -Check	01/20/2023	81943	iFocus Consulting, Inc.		5,425.00
Bill Pmt -Check	01/20/2023	81944	Jackson and Son Oil		11,113.46
Bill Pmt -Check	01/20/2023	81945	Jim Varner's Automotive		114.60
Bill Pmt -Check	01/20/2023	81946	KPFF, Inc.	Project # 10182100009	1,403.13
Bill Pmt -Check	01/20/2023	81947	Lawson Products	Cust # 10075026	223.78
Bill Pmt -Check	01/20/2023	81948	Maul Foster & Alongi, Inc.		3,293.75
Bill Pmt -Check	01/20/2023	81949	French's Gutters & Sheet Metal, Inc.		150.00
Bill Pmt -Check	01/20/2023	81950	Merchants Exchange of Portland	Cust ID: PORAST02	980.00
Bill Pmt -Check	01/20/2023	81951	Northwest Roofing & Construction LLC	Final Invoice for P2 Warehouse project	15,220.00
Bill Pmt -Check	01/20/2023	81952	NW Natural	Acct #2456834-7	18.13
Bill Pmt -Check	01/20/2023	81953	Olson Asphalt Maintenance, LLC		26,700.00
Bill Pmt -Check	01/20/2023	81954	Orkin Pest Control	28012851	98.00
Bill Pmt -Check	01/20/2023	81955	P & L Johnson Mechanical, Inc.		763.31
Bill Pmt -Check	01/20/2023	81956	Pacific Power	Acct #09996911-015 6	2,411.71
Bill Pmt -Check	01/20/2023	81957	PacificSource Administrators	Employer ID: P00431	1,729.12
Bill Pmt -Check	01/20/2023	81958	Pape Machinery, Inc.	Cust # 101890	175.11
Bill Pmt -Check	01/20/2023	81959	Performance Systems Integration, LLC	901626	2,179.16
Bill Pmt -Check	01/20/2023	81960	PERS Health	AS - Group: 10013822 Subscriber: H80550901	277.38
Bill Pmt -Check	01/20/2023	81961	PetroCard, Inc.	01-0004280	604.00
Bill Pmt -Check	01/20/2023	81962	Platt Electric Supply (Rexel)	Acct #135946	3,235.87
Bill Pmt -Check	01/20/2023	81963	Quadiant (postage)	X3391	352.85
Bill Pmt -Check	01/20/2023	81964	Robert D Hanks	RH - Group: 10013822 Subscriber: J24129553 JAN2...	554.76
Bill Pmt -Check	01/20/2023	81965	Sierra Springs	928320221793628	249.73
Bill Pmt -Check	01/20/2023	81966	Solutions YES, LLC	Acct # PO03	70.20
Bill Pmt -Check	01/20/2023	81967	Special Districts Insurance Services	Entity ID: 16324	201,756.00
Bill Pmt -Check	01/20/2023	81968	Special Touch Janitorial, Inc.	January 2023	3,812.50
Bill Pmt -Check	01/20/2023	81969	Spectrio, LLC	Acct # SPX755863	105.00
Bill Pmt -Check	01/20/2023	81970	Sweet Septic and Portable Service		260.00
Bill Pmt -Check	01/20/2023	81971	Terry's Plumbing LLC.	W/O 221932	65.13
Bill Pmt -Check	01/20/2023	81972	TKE (Thyssenkrupp Elevator Corp)	Cust # 71259	1,023.75
Bill Pmt -Check	01/20/2023	81973	Trails End Reccvery		101.25
Bill Pmt -Check	01/20/2023	81974	Wells Electrical Contracting, Inc.		1,496.10
Bill Pmt -Check	01/20/2023	81975	WHA Insurance Agency, Inc.	Policy # 37P16324	7,740.00
Bill Pmt -Check	01/20/2023	81976	Winning Solutions, Inc.		800.00

Total 102-02 - CCB Operating #1442

712,239.93

Total 102-00 - Cash

712,239.93

TOTAL

712,239.93

1-23-2023
JTC OK

Wine

February 2023

February 2023							March 2023						
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa
			1	2	3	4				1	2	3	4
5	6	7	8	9	10	11	5	6	7	8	9	10	11
12	13	14	15	16	17	18	12	13	14	15	16	17	18
19	20	21	22	23	24	25	19	20	21	22	23	24	25
26	27	28					26	27	28	29	30	31	

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
Jan 29	30	31	Feb 1 7PM Gearhart City Council Mtg	2	3	4
5	6 7PM Astoria City Council Mtg	7 4PM Regular Session 6PM CB City Council Mtg	8 6PM Clatsop Cnty Commission	9	10	11
12	13 7PM Seaside City Council Mtg	14 6PM CB City Council Work Mtg 6PM Warrenton City Council Mtg	15	16	17	18
19	20 7PM Astoria City Council Mtg Presidents' Day - Office Closed	21 4PM Regular Workshop Session	22 6PM Clatsop Cnty Commission	23	24	25
26	27 7PM Seaside City Council Mtg	28 530PM Astoria Planning Commission 6PM Warrenton City Council Mtg 7:30AM AWACC Breakfast Mtg	Mar 1	2	3	4

Construction Manager/General Contractor Request for Proposals for Pier 2 West Rehabilitation

Proposal Scoring Sheet

SELECTION SCORING MATRIX - SUMMATION SHEET						
Metrics					Points	
Weight	Project Experience	Max Score	Min Score	Basis of Point Calculation	Bergerson	Orion
	Number of Projects with Back-Filled Seawall	20	0	2 pts for each project that included back-filled seawall as part of the project	6	8
	Project Cost - total of all projects	35	0	Max points to Proposer with greatest contract totals; other Proposers distributed proportionately; see 'ProjectEval' Sheet	8.75	35
	Number of Projects using CMGC approach	0	0	2 pts for every project so employing	0	0
	Dollar Amount of Change Orders that Reduced Project Cost	25	0	Max points to Proposer with greatest reduction in total contract price; remainder distributed proportionately. Zero points to Proposer with no reductions.	25	0
	Location of Project	35	0	Max points to Proposer with greatest experience in areas closest to Astoria; remainder distributed proportionately; see 'ProjectEval' Sheet	35	7.0
25%	Category Totals	115	0			
	Safety	Max Score	Min Score	Basis of Point Calculation		
	Other Metrics	20	0	See 'Safety' Sheet for Details	9.5	20
	EMOD Rating	20	-30	See 'Safety' Sheet for Details	4.9	20
10%	Category Totals	40	-30			
	Staffing and Staff Qualifications	Max Score	Min Score	Basis of Point Calculation		
	Education & Experience of Staff	30	0	See 'Staff' Sheet for Details	17.7	22.9
	Key Staff Past Projects	25	0	See 'StaffProjects' Sheet for Details	25	21.2
	Degree of Commitment to this Project by Key Consultant	15	0	Both Proposers committed 100% availability of key staff during project construction	15	15
16%	Category Totals	70	0			
	Project Approach	Max Score	Min Score	Basis of Point Calculation		
	Project Approach Description	100	10	See 'Approach' Sheet	88	39
22%	Category Totals	100	10			
	Project Schedule and Fees	Max Score	Min Score	Basis of Point Calculation		
	Schedule	40	0	See 'ProjSched' Sheet	25	25
	Fees	40	0	See 'Fees' Sheet	27	14
	Cost of Work	0		Not Scored as per RFP Amendment		
18%	Category Totals	80	0			
	Public Entity Experience	Max Score	Min Score	Basis of Point Calculation		
	Public Entity Experience	40	0	See 'PublicEntity' Sheet	24	28
9%	Category Totals	40	0			
	Total Possible Points	445			311	255

If both Proposers are within 10% of each other's score, then both will be deemed to be within the Initial Competitive Range; if not, then only the Proposal with the highest score will be within the Initial Competitive Range.

Primary Reasons that Bergerson Scored Higher in the CM/GC Selection Process

1 Lower Price

Construction Fee at 8.25%
(vs Orion at 13%)
Preconstruction Fee at \$215,300
(vs Orion at \$300,000)

2 Project Approach

2.1 Document Familiarity

Bergerson made several references to the design documents - especially the seismic discussion - that evinced detailed familiarity with them.

Orion made fewer references to the design documents - and these were much more general in nature and evinced less familiarity with the documents. However, other portions of both the Proposal and interview discussion evinced a good familiarity with the design documents.

2.2 Seismic Improvements

Bergerson identified this issue and spent much time discussing it, along with proposing specific solutions.

Orion did identify this issue but spent much less time discussing it, indicating that they may not have recognized its significance to this project. Their proposed solution was more general in nature (leaving the piles in place) and did not appear to be a complete solution to the problem.

2.3 Seismic Improvements: Tie Back Conflicts

Identification of alternative construction methods and potential problems with engineer-proposed designs are basic purposes of the CMGC approach. Bergerson identified an issue (potential conflict b/w tie-back installation and deep-soil mixing ground improvements) where even KPFF did not.

Orion did not identify this issue - or any other potential problem with the 30% design documents of similar significance.

2.4 Alternative Design Identification and Discussion

Bergerson identified and discussed the PND proprietary design as a potentially better design in general, but also identified this design as a potential solution to the specific seismic issues as well.

Orion identified an alternative design in their Proposal but withdrew the suggestion at time of interview.

2.5 Seawall Installation

Bergerson discussed the potential to install the seawall prior to all other possible elements of the Work as a way to increase efficiency - but they proposed that two IWWW would be necessary, and that a temporary retaining wall would have to therefore be built as a result (which increases cost).

Orion discussed the potential to install the seawall prior to all other possible elements of the Work as a way to increase efficiency - AND they asserted that they could install the entire seawall in one IWWW, thereby reducing cost and overall timeframe.

This is the only sub-category in which Orion exceeded Bergerson.

2.6 Ability to Administer CMGC Contract Type

Bergerson discussed this issue during the interview with sufficient clarity and depth to indicate they understood the importance of the issue. Further, they committed to subcontract with a consultant with several years of experience with the CMGC type of contracting.

Orion did not discuss this issue; however, points were awarded based on inference of some ability to handle the CMGC type of contract based on sheer amount of other experience.

**Port of Astoria
Pier 2 West Rehabilitation
CMGC Proposal**



Submitted by:



Bergerson Construction, Inc.
PO Box 387
300 Railroad Ave., Suite 200
Astoria, OR 97103

Submitted to:



Port of Astoria
422 Gateway Avenue, Suite 100
Astoria OR 97103
Date: December 16, 2022

P.O. Box 387
Astoria, OR 97103
Office 503-325-7130
Fax 503-325-0174
24 Hour Service



“for a job well done”

TIN # 93-0600594
OR CCB# 63328
WA CC01 BERGECI 1210H
info@bergeron-const.com
www.bergeron-const.com

December 16, 2022

Port of Astoria
ATTN: Matt McGrath, Deputy Director
422 Gateway Avenue, Suite 100
Astoria OR 97103

Project: Pier 2 West Rehab
RE: CMGC Proposal

Mr. McGrath,

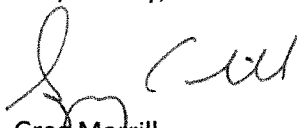
I would like to take this opportunity to thank you for considering our firm for CMGC services on your Pier 2 West Rehabilitation project. As an established marine contractor on the waters of the Pacific Northwest for the past 54 years, Bergerson Construction is uniquely familiar with the waterfront projects in this region, including numerous projects in the Lower Columbia River. We endeavor to bring this experience and our commitment to excellence to your project.

Much of our company's history is intertwined with the Port of Astoria central waterfront. As such, we believe our familiarity with this facility is unsurpassed and will be of great value to the Port. Additionally, we have assembled a team of contractors that bring essential experience to assist the Port in finding the best solution for this project.

We specifically acknowledge receipt of 2 addenda to the RFP.

We look forward to working closely with you and your staff to ensure a successful project that will serve the Port of Astoria for many decades. As you review the information contained herein, please do not hesitate to contact me personally with any questions or concerns.

Respectfully,



Greg Morrill
President

POA PIER 2 CMGC

4.2.1 PROJECT EXPERIENCE (Attachment A)

Bergerson Construction is an experienced marine contractor based in Astoria, OR. Our experience consists primarily of waterfront structures on the Columbia River and other bodies of water in the Pacific Northwest. A large percentage of our work is for public clients. Attachment A includes a few example projects from the past decade.

4.2.2 SAFETY

Safety is a core value at Bergerson Construction and will receive the utmost attention on this project. While production is important to any job, we go to great lengths to ensure that production does not compromise a safe working environment. This is reflected in our excellent Experience Modification Rate (EMR) as shown here:

- 2019— .88
- 2020— .95
- 2021— .89
- 2022— .86

Our safety program is comprised of three primary components – Training, Supervision and Application.

TRAINING

We believe training is one key component to an effective safety program. Our crews have been provided with OSHA 10-hour training at a minimum and each of our crane operators are nationally certified. Task-specific training is provided for the activities expected for the individual. Some examples of training include fall-protection, rigging and signaling, silica awareness, forklift operation, aerial lift operation, confined space, man-overboard response, and many others. We also provide first-aid and CPR training for all field personnel.

SUPERVISION

Safety supervision begins with planning from the time of bid and continues through project completion. Project specific safety plans are prepared during the preconstruction phase and implemented during construction. All our site superintendents and project managers are OSHA 30 certified. Additionally, project specific safe work practices and procedures are addressed by use of Activity Hazard Analyses and are adjusted as needed to address site conditions.

APPLICATION

Application of safety training and planning is primarily accomplished through use of the Activity Hazard Analyses and through regular safety meetings. This helps ensure that safe work practices are effectively implemented on the work site. Effective communication between workers, subcontractors, owners' representatives and any users of the facility is essential in ensuring a safe project.

SUBCONTRACTORS

Our subcontractors will be required to provide documentation of applicable training for their crews before working on site. Safety prequalification will be part of the bidding requirements for all subcontractor packages to reduce the safety risk to project stakeholders. Once on site, any subcontractor will be required to take part in daily safety briefings and comply with all applicable safety rules for this type of work.

This project has the potential risk of the presence of non-construction personnel near construction operations. Active work areas will be cordoned off with temporary fencing to restrict access. Care will be taken to inform non-construction personnel of the hazards near the work area and limit access to potential hazard zones. Additionally, daily safety meetings will be held for all contractors on the jobsite and are open to the owner's representatives for safety coordination.

All construction will be performed according to the rules set forth by 29 CFR 1926. Some specific considerations for safety coordination on this contract are listed below:

- Jobsite fencing & signage to limit non-construction personnel entering the work zone
- Daily Site Safety Briefings with Weekly Site Safety Audits
- Project information will be submitted to the US Coast Guard for publishing in the Local Notice to Mariners
- VHF Marine Radio communication during vessel movements
- Mandatory hard hat in all construction zones for duration of contract
- Mandatory use of all required PPE including Hi-Visibility safety clothing
- Lock out/ Tag out procedures for all utilities
- Provide hearing protection for all personnel during pile-driving and other "loud" operations
- Mandatory PFD's for all construction personnel on barges, boats, floats and waterfront structures.

ENVIRONMENTAL

As with any waterfront construction, environmental protection is second only to safety. All Best Management Practices (BMP's) required by the project plans, specifications and permits will be implemented and maintained to ensure effective protection of our natural resources. The following are some examples of BMP's that will be employed during this project:

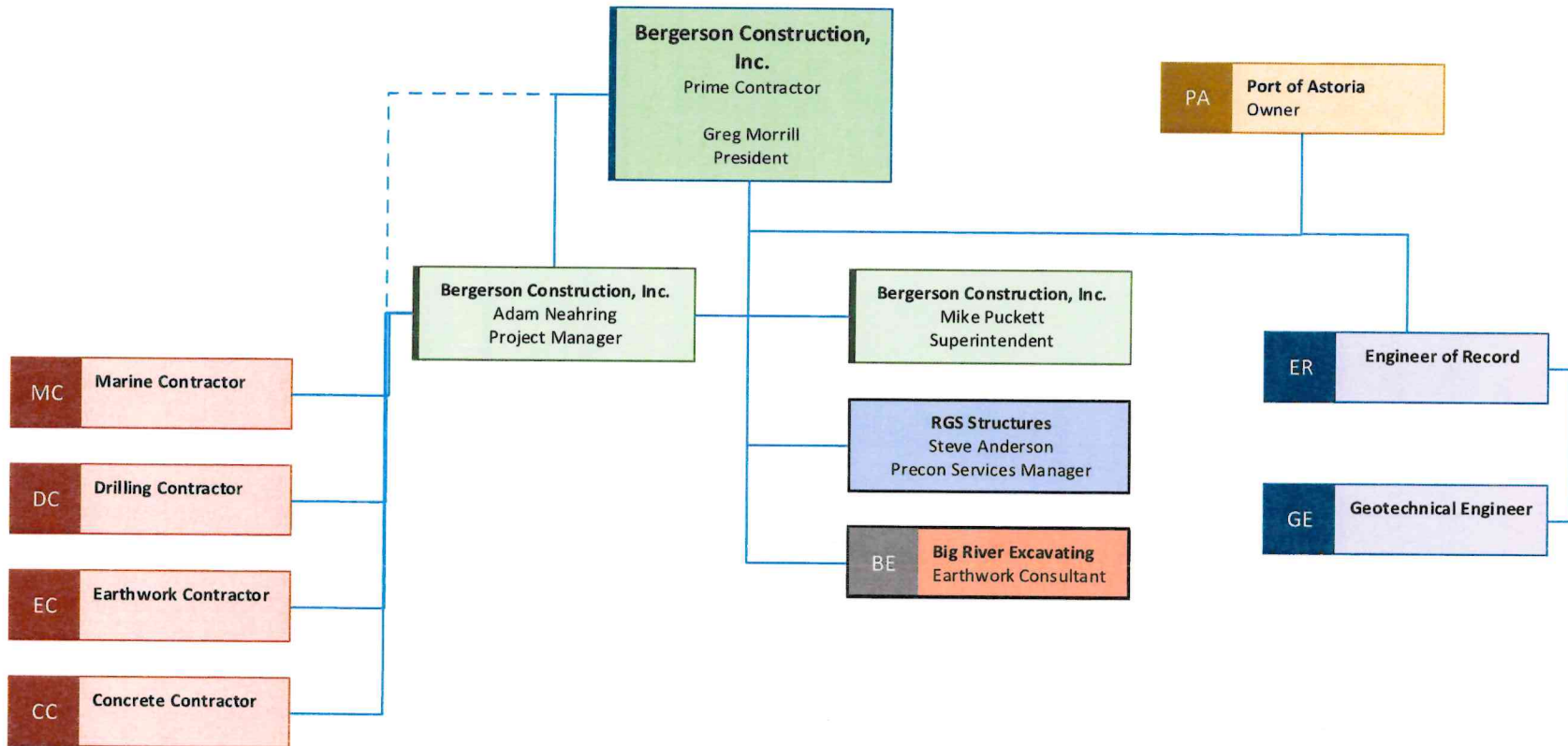
- Floating debris boom around work area
- Patrol of water for "flotsam and jetsam" escaping from debris boom
- Spill response kits will be maintained on site for the duration of the contract

- Equipment will be inspected for leaks each day prior to operation
- All vibratory pile hammers will operate using biodegradable hydraulic oil
- Bubble Curtains will be used during any impact piling
- Emergency contact information in case of spill will be posted on site in the project trailer
- 24-hour contractor contact will be established for duration of contract
- BMP's will be adjusted if they prove to be insufficient
- Erosion control measures will be installed around exposed excavations

4.2.3 STAFFING & STAFF QUALIFICATIONS

The following page is a project organization chart for the preconstruction phase of this project. Attachment B contains specific information for the team members including company information/experience and résumés.

Proposed Project Organization Chart



4.2.4 PROJECT APPROACH

PROJECT UNDESTANDING

Pier 2 West at the Port of Astoria has slowly evolved over the past three decades from a cargo terminal to a fishing terminal. The pier, consisting of a filled-earth peninsula, bordered on three sides by a marginal wharf, was originally constructed in the early 20th century. At that time, timber materials were an abundant resource and the material of choice for construction of this type of structure. The marginal wharf is a timber-pile supported timber structure that has had many repairs made over its life. Some of these repairs include adding steel sheetpiles at the top of the slope, replacing timber posts and other timber members, paving over the wood structure, removing deck and reconstructing with concrete, and various strategies. Unfortunately, none of these repairs have kept pace with the deterioration of this aging structure.

The West side of Pier 2 is currently used for seafood offloading with processing occurring inside the building. This is an important consideration for any project taking place at this facility. Repair or reconstruction must incorporate a comprehensive phasing plan that will minimize disruptions to Port tenants with operations on Pier 2.

Over the past few years, the Port has been working with designers to develop a comprehensive plan to replace or restore the marginal wharf along the west side of Pier 2. A host of options have been developed to address the various aspects and challenges with this facility. The repair solutions have been narrowed to three options. Currently the Port has selected what is believed to be the most practical and cost-effective solution presented by the design team.

The Port has decided to onboard a CMGC contractor to work with the engineer as the design is finalized and to assist with construction estimating. This collaboration between owner, engineer and contractor is a proven strategy that will assist the Port in a successful project.

It is recognized that funding for construction has yet to be secured. Additionally, environmental permit applications have not been submitted since the design option had not been fully decided. As such, much of the work under the CMGC preconstruction effort will be to determine final project scope and budget so the Port can secure funding and environmental permits.

THE TEAM

Bergerson Construction and its team as presented herein, has worked with numerous clients in the region, both formally and informally, in developing project approaches, performing constructability reviews, cost estimating and value engineering. Each contractor member of our proposed team is vested

in our local community and brings a wealth of experience in a variety of construction types and methods as well as knowledge of local/regional resources. This experience will be of great value as we work with the Port to achieve its goals on this facility. Below is a brief outline of what each team member will bring to the table during preconstruction. Further details are presented in Attachment B.

Bergerson Construction – Bergerson Construction is a mid-sized marine contractor based in Astoria. Over our 54-year history, we have performed much of the waterfront construction and repairs that has occurred at the Port of Astoria in recent decades. Our experience and detailed knowledge of this particular facility will be of great value to project planning effort. Our team can provide extensive input on marine construction methods that will maximize efficiency, economy, longevity and suitability for Port and tenant operations. Additionally, we can offer strategies to maximize construction schedule efficiencies despite the short windows for in-water work.

RGS Structures – RGS Structures is new to our region in name only. This company was formed by individuals with extensive knowledge in concrete and commercial/institutional construction in our region. Additionally, their team is highly experienced in CMGC contracting methods. Their team will be instrumental in management of the preconstruction effort as well as estimating the concrete construction portions of the project.

Big River Construction – Big River Construction is an excavation and heavy-civil construction firm based in Astoria. Over the years, our firm has worked extensively with their team on waterfront construction projects that require substantial earthwork. Their firm's trusted experience with environmentally sensitive areas along the water, plus their knowledge of local resources brings great value to our team.

PRECONSTRUCTION PHASE

The preconstruction phase of this project will be essential to the success of the construction phase. This process will be initiated by a complete review of all information to date followed by a project kickoff meeting with the Port and its consultants. Regular weekly project meetings will be held throughout the preconstruction phase to update the Port on progress. These meetings will be virtual or hybrid to maximize attendance from key individuals.

As our team gains a fuller understanding of the project, we will begin constructability review of the current design. This will require engaging with potential key subcontractors to gain input that may be of value to the project such as construction methods and mitigation of possible challenges. During this process, we will explore potential alternate designs for various aspects of the project, as well as value-engineering opportunities. Early collaboration between our team, the Port and the designer will allow this valuable input to be efficiently incorporated in the final design.

Although cost estimating will be a continuous part of the preconstruction effort, we are anticipating three key estimating milestones/deliverables. These will be Schematic Design (30%) Estimate, Design Development (60%) Estimate and GMP based on Construction Documents (90%). In between these estimates, our team will be evaluating various pricing considerations as more information becomes available. Another key aspect of this process will be reconciling construction estimates with those

produced by the designer. Doing so will give the Port confidence in the budget as funding sources are being secured.

During the incremental cost estimating, our team will be able to effectively evaluate current market conditions that could affect price and availability of materials, specialty subcontractors, and other resources. As this information is gathered, strategies will be developed for subcontractor bid packages that will present the best combination of cost, schedule, quality and safety. These strategies will help minimize risk to the schedule and budget.

Throughout the preconstruction phase, a project schedule will be developed and maintained. As information becomes available, this schedule will include details regarding design and permitting timelines, bidding targets and deadlines, material lead times, in-water work restrictions, tenant operations, and construction phasing/sequencing. The schedule will begin as a schematic schedule and then developed in a collaborative manner with project stakeholders. Schedule will be a regular topic in the weekly meetings for input and updates from all parties involved. As information regarding project funding becomes available, this will also be incorporated into the schedule.

CONSTRUCTION PHASE

The construction phase of this project is anticipated to begin late in the summer of 2024. However, it is noted that this is subject to receipt of funding and permits. In order to meet this start date, there will be certain materials that will need to be procured early. Depending on timing of funding, it is anticipated that some materials may be procured through early work authorizations. The authorizations may be partial authorizations based on items from the GMP, or in some cases they may precede finalization of the GMP. This will be an item of regular discussion in weekly meetings as the design nears completion.

All subcontract packages will be structured with material lead times in mind.

Prior to physical work beginning onsite, the work area will be secured and cordoned off as necessary to keep non-construction personnel from entering the work zone. Any project laydown areas will be clearly marked as well. Signage will be posted, clearly identifying the work area and areas of construction traffic. Signs at the jobsite entrance will provide basic site information such as project name, project contacts, PPE requirements and any other pertinent information.

During construction, a project superintendent will be dedicated to the project and will be the primary contact for any field activities and will supervise all work on the jobsite. The superintendent will be assigned additional staff as needed to assist with management of safety, quality and site operations.

Prior to starting any work on site, each subcontractor will be required to submit all required safety documentation and provide proof of insurance, including US Longshore & Harbor Workers coverage. Additionally, subcontractors will be required to acknowledge all environmental requirements for the project. Any subcontractor not in compliance with safety or environmental requirements may be subject to disciplinary action up to and including removal from the project.

Project Documentation during the construction phase will consist of Daily, Weekly and Monthly reports that will be submitted to the owner's representative. Daily reports will consist of one or more reports that include a record of project activities, entities on site, number of workers and hours on site, safety

meetings, safety incidents or near misses, quality control activities, weather, etc. Also, daily reporting will make note of any problems encountered or anticipated.

Weekly reporting will include a summary of each week's activities, plus a three-week "look ahead" schedule to update the owner on anticipated upcoming activities. This will be part of the weekly update meeting with the owner and project stakeholders.

Monthly reporting will consist of a budget update, formal schedule updates, progress pay requests, RFI logs and Change Order logs. A discussion of variations in schedule or costs will be included. As stated in the contract, monthly reporting may be a combination of written and oral reports and may include additional items as deemed necessary by the project team or owner.

QUALITY CONTROL

One key to any successful construction project is the incorporation of an effective quality control system. Effective quality control during construction begins on the contractor level and should not be of great burden to any owner. With this in mind, Bergerson Construction brings to the table our many years of experience working with owners such as the US Army Corps of Engineers and the US Coast Guard. This experience has helped us implement a simple 3-phase quality control program, designed by the Corps of Engineers, that can be easily implemented on the simplest and most complex of construction endeavors. On small projects each phase may only need to be implemented once, while on large, multi-faceted jobs each phase may be executed repeatedly for numerous tasks.

Construction Quality Control Phases

- **Phase 1—Preparatory Phase** – During this phase, all submittals are reviewed by the owner, the engineer and the contractor to ensure compliance with the contract requirements. Any requests for clarification are submitted to the owner and engineer for their input. Work procedures and sequencing, safety concerns and potential value engineering are all items for discussion at this point. This phase sets the stage for successful field operations.
- **Phase 2—Initial Phase** – As the start of actual construction draws near, submittals, the project drawings and technical specifications are reviewed by contractor personnel. Materials being received are checked against these documents and any deficiencies are noted and corrected. Prior to start of a particular task, a pre-task meeting is held to review the design and submittal documents, discuss work sequence, review safe work procedures, coordinate inspections and establish quality expectations.
- **Phase 3—Follow-up Phase** – This phase consists of inspection by construction personnel, site management, engineers, third party inspectors and owner's representatives. The process of inspection is more than a mere formality but rather becomes part of the daily construction routines as the personnel performing the work become "First Tier" inspectors. Project management personnel continually monitor the field activities to be sure the construction is meeting the levels of quality outlined in the first two phases. During this phase, any required third-party inspections will take place for guaranteeing compliance with the applicable codes.
- **Correction of Deficiencies** – If at any time during the 3-phase process a deficiency is noted, it will be brought to the attention of the project management, who will be sure the proper actions are implemented.

- **Qualified Construction Personnel** – As part of the quality control process, only experienced, properly trained and qualified workers will be allowed to perform any critical aspects of the work.

Third Party Inspection

Third party inspection, as required by the IBC, is a common component of construction. When occurring on a marine project though, careful coordination is essential as access for the inspectors is quite limited and dependent upon the marine contractor's activities. Bergerson Construction will work closely with the Port's design team in coordinating and scheduling such inspection to limit the impact this important quality control activity might have on the schedule. Those inspections required for shop-fabricated items will be coordinated jointly by Bergerson and the appropriate supplier.

Communication

The 3-phase plan described above is designed such that the owner's representatives and the contractor are equally involved in the process. Our onsite superintendent will be directly responsible for coordination of each phase of the QC process with the engineering team as well as any third-party inspectors. He will also be responsible for ensuring that all subcontractors follow the steps outlined in our QC plan.

All inspections will be documented by the superintendent and these reports will be delivered to the appropriate project staff, with copies available to the Port's representative, for review and comment. If at any time any party involved in the management of this project has any questions or concerns, these should immediately be brought to the attention of the Superintendent.

UNIQUE/CREATIVE STRATEGIES

The repair/reconstruction project for Pier 2 presents a host of unique conditions that must be addressed in the design, construction and management phases of the project. Projects of this type sometimes require "outside-the-box" approaches and thought processes. Bergerson and its team is excited to collaborate in this process and develop creative strategies.

After review of the engineering reports included in the RFP, our team believes that there are some design concepts that may have yet to be explored for this facility. During the proposal process, we have discussed this project with an engineer familiar with waterfront structures in the Northwest. These discussions have indicated that these alternate concepts may be feasible, resulting in significant savings to the project. If Bergerson is selected for this contract, we hope to partner with the Port in exploring such options.

Another strategy that we believe will bring value to the project is a robust local utilization strategy. We recognize the contract requires that bidding out work packages. However, it is our experience that such work packages should be crafted to encourage local involvement. This will typically bring great value to any project. It also helps the public contracting body show how these projects can benefit the local region.

4.2.5 PROJECT COSTS & TIMELINE

PRECONSTRUCTION FEE (SEE Attachment C)

It is estimated that the preconstruction effort that is outlined in the RFP documents will take place over a one-year period of time. As such, our preconstruction fee is structured to reflect one-year of project meetings. Also included are key estimate deliverables, constructability reviews, value engineering, GMP preparation and permitting assistance.

Our Preconstruction Fee and Breakdown is presented in Attachment C.

CONSTRUCTION FEE (SEE Attachment C)

The Construction Fee for this project is also presented in Attachment C. This is presented as a percentage that is applied to the cost of work to cover corporate overhead, corporate office, permanent yards, profit, and non-reimbursable costs. As the GMP is prepared, this percentage-based fee will be applied to the cost of work to determine a lump-sum CMGC fee for the project.

COST OF WORK (SEE Attachment D in Separate envelope)

Attached to this proposal, in a separate, sealed envelope, is our cost estimate based on the 30% design presented in the RFP, Schedule RS1.A, Exhibit RE.6, and Exhibit RE.7. On a few items, we found significant discrepancies between the quantities listed in Exhibit RE.6 and what would be necessary to accomplish the work in the 30% design documents. In these cases, we made adjustments to the quantities. These changes are noted as part of our cost presentation in Attachment D.

PROJECT SCHEDULE (SEE Attachment D in Separate envelope)

Included with the Cost of Work presentation in Attachment D is a conceptual schedule for the construction activities on this project. This is based on the 30% design documents and the phasing presented in Exhibit RE.7 in the RFP. This schedule is based on general assumptions as to how this project would progress but may be subject to significant revision as the design is further developed.

4.2.6 PUBLIC ENTITY EXPERIENCE

Over the past two decades or more, Bergerson Construction has worked predominately for public clients. Much of our work is for public ports throughout the Pacific Northwest. Each member of our team also is well-experienced in public-sector contracting. In Attachment A, we have presented project experience and resumes, which demonstrates our extensive experience in public contracting.

Understanding prevailing wage and certified payroll requirements is an essential aspect of public contracting. Our project experience has given us an excellent understanding in both state and federal prevailing wage requirements. Our staff also works closely with less experienced subcontractors in ensuring their payroll reporting meets public rules.

For this project, all notifications required by public contracting rules will be posted in local media as well as the Oregon DJC. This will ensure that the Port is in compliance with the advertising requirements of public contracting rules. At the Port's request, additional publications for advertising for subcontractors will be added.

4.2.7 OTHER REQUIREMENTS

Bergerson Construction, Inc. is a resident bidder of the State of Oregon as defined in ORS 279A.120. Bergerson Construction, Inc. agrees to be bound by and will comply with all applicable state and federal laws, including but not limited to ORS 279C.838, 279C.840 and 40 USC 3141 to 3148.

INTENT TO COMPETE

The project team we have presented in earlier sections of this proposal is comprised of well-qualified local contractors with experience in this type of work. Our team is keenly interested in serving the Port on this project during the construction phase. We believe our local resources, knowledge and experience will bring great value to the Port during every phase of this contract.

We recognize that the construction will be segregated into subcontractor packages for competitive bidding. In accordance with the contract documents, our team intends to compete on many of these packages of work as listed below:

- As a marine contractor, Bergerson intends to bid all portions of work requiring piledriving, pier demolition, marine access and overwater construction.
- RGS Structures intends to bid all concrete work (with marine support from Bergerson), as well as any foundation concrete along the Pier 2 building and any ancillary concrete work.
- Big River Construction intends to bid all work requiring excavation, backfill, trenching and related activities.

ATTACHMENT A

4.2.1 Project Experience

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	City of Des Moines, WA
Engineer:	Exceltech	Completion Date:	December 2022 (Estimate)
Original Contract:	\$9,493,859	Final Value:	\$ TBD

City of Des Moines N. Marina Bulkhead

The bulkhead surrounding the North Marina Parking lot at the Marina in Des Moines, WA was a treated timber piling wall in various stages of failure. This project consisted of replacing this structure as well as constructing a pedestrian walkway and plaza, new restroom building and improvements to the parking lot.



The new bulkhead required 870 LF of steel sheetpile topped with a cast-in-place concrete cap & walkway. The bulkhead is restrained by drilled soil anchors tied to the structural concrete. A timber pile breakwater structure was also replaced with a 150 LF sheetpile and pipe pile “combi wall” topped with a concrete cap. Demolition of the treated timber structures was performed predominately during lower tides and behind a turbidity curtain to minimize environmental impacts.

The Bulkhead & breakwater construction was constrained by in-water work timing that placed much of the construction in the winter months. Careful planning around weather, tides, storm surges, and daylight was essential to the ultimate success of these project. At the City’s request, all in-water work was compressed into one season. Careful coordination with the City for pedestrian access and event planning was essential in reducing impacts to the local community.

The restroom building, architectural concrete and site work were subcontracted to qualified firms local to the project area. Extensive planning/coordination with City consultants was required for some of the artistic plaza features to create a beautiful plaza area for public enjoyment.

Name:	Andrew Merges	Title:	Public Works Director
Organization:	City of Des Moines	Email:	amerges@desmoineswa.gov
Telephone:	(206) 870-6568	Fax:	(206) 870-6596

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Port of Kalama
Engineer:	PND Engineers	Completion Date:	June 2022 (Estimate)
Original Contract:	\$3,554,622	Final Value:	\$ TBD

Port of Kalama Small Cruise Ship Dock

For years, small cruise ships have been stopping in Kalama, WA but the only shore access for passengers was via a gangway lowered onto a sandy beach. This project involved constructing a dedicated facility for these vessels to moor and to provide superior access for passengers.

Construction of this new facility consisted of installation of six monopile dolphins using 36" diameter, 150' long pipe piles, outfitted with floating donut fenders. A 125' long adjustable gangway with hoisting tower and connecting bridge was fabricated and installed for access from the ships to the shore. A concrete emergency access road was constructed. The existing pedestrian pathways and surrounding landscaping were improved.



Due to schedule constraints and limited interest from precast concrete manufacturers, the concrete pilecaps for the gangway were precasted in our facility in Astoria and barged to Kalama. Other long lead materials led to creative schedule solutions to ensure all in-water work was completed before the regulatory deadlines. Bergerson Construction worked closely with the owner and key subcontractors to ensure the facility was ready for the arrival of the first ship on April 2, 2022.

Name:	Darin Sampson	Title:	Project Manager/Maintenance Supt.
Organization:	Port of Kalama	Email:	dsampson@portofkalama.com
Telephone:	(360) 673-2325	Fax:	

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Front Street Marine, LLC
Engineer:	BergerABAM (WSP)	Completion Date:	April 2021
Original Contract:	\$3,182,910	Final Value:	\$3,271,284

Front Street Marine – Newport Wharf

Bergerson Construction was approach by the owner of this property in 2014 regarding building a new seafood wharf on the Newport Oregon waterfront at the location of the Undersea Gardens, a popular tourist attraction. This contract was set up as a design-build project. For design, Bergerson teamed with BergerABAM, a trusted waterfront engineering firm in the Northwest. Due to some issues with property leases, the project was postponed until 2019.



Photo Courtesy of BergerAbam

The project consisted of 78 ea. 24" diameter steel pipe piles, 11 steel fender piles, 100-ton micropiles, and a 1300 CY cast-in-place concrete deck. The project site had limited access from the land due to heavy traffic and pedestrian usage of the area. Immediately to the west of the project is a pedestrian access pier and restaurant, presenting some unique considerations for safety.

The environmental permits required that the facility be designed with stormwater collection and filtration incorporated into the concrete deck.

Prior to construction, our team was contracted separately for removal of the Oregon Undersea Gardens facility and associated breakwater wall.

Name:	Stephen Webster	Title:	Owner
Organization:	Front Street Marine, LLC	Email:	riverbendmarine@charter.net
Telephone:	(541) 265-9243	Fax:	

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Port of Alsea
Engineer:	HLB-OTAK	Completion Date:	December 2021
Original Contract:	\$2,960,527	Final Value:	\$2,919,923

Port of Alsea Marina Improvements

The Port of Alsea marina is a popular site for recreational fishing and crabbing as well as kayaking and some commercial crabbing. The existing floats and pedestrian pier were at the end of their service life and in dire need of replacement. Bergerson Construction was awarded this contract through a design-build proposal process for replacement of the aging marina and boatramp.



Alsea – Marina (July 2021)

The project consisted of several key elements. It began with marine demolition of the floats and piles. The marina area was dredged to the appropriate depth using hydraulic dredging methods. The boat ramp and boarding floats were also replaced in accordance with the already completed OSMB design. The design included an HDPE float with galvanized framing and fiberglass grating in order to balance cost, function and permit restrictions. Galvanized

steel piles were selected for ease of installation and corrosion protection.

PND Engineers was our design partner on this project, selected in light of their vast marine experience in this region. Bergerson worked closely with the Port in obtaining all permits for the new marina configuration, and developed a cost-effective strategy for the required environmental mitigation. Bergerson Construction was able to use trusted local subcontractors for much of the utility work.

Name:	Roxie Cuellar	Title:	Port Manager
Organization:	Port of Alsea	Email:	rcuellar@portofalsea.com
Telephone:	(541) 563-3872	Fax:	

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Port of Everett
Engineer:	Segment B - Moffat & Nichol Segment C - Reid Middleton Segment D - PND	Completion Date:	June 2017
Original Contract:	\$4,039,456 (Segment D) \$4,766,630 (Segment C) \$1,387,890 (Segment B)	Final Value:	\$4,270,451 (Segment D) \$4,787,868 (Segment C) \$1,498,827 (Segment B)

Port of Everett Central Marina Improvements

(Segment B, C & D)

The Port of Everett is in the middle of an extensive redevelopment of their Central Marina, which used to be home for many marine related industrial operations, including small shipyard operations. Bergerson Construction has had the privilege of participating in three phases of this exciting transformation of the Everett waterfront, first as a subcontractor on Segment B and then as the prime contractor on the other phases.



Segment C (2016)

Segment B involved environmental cleanup, seawall construction, marine demolition, and marina reconstruction. Segment C was similar, but involved much less remediation work but added extensive utility construction. Segment D shared elements similar to the Segment C but added a steel and timber wharf structure that becomes the focus of the public interface with the marina.

Each phase was constrained by in-water work timing that placed much of the construction in the winter months. Careful planning around weather, tides, daylight and operational scheduled was essential to the ultimate success of these projects.

At the beginning of each phase, Bergerson personnel worked closely with the Port and its design consultants to develop a strong partnering relationship. This proved to be highly beneficial when addressing various challenges associated with these projects.

Name:	Willie Watson	Title:	Project Manager
Organization:	Port of Everett	Email:	williew@portofeverett.com
Telephone:	(360) 632-7070	Fax:	

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Port of Toledo
Engineer:	BergerABAM & GRI	Completion Date:	July 2015
Guaranteed Max. Price:	\$1,726,604	Final Value:	\$1,636,084

Port of Toledo Boat Haulout Pier

(Design-Build)

This project involves both design and construction of a two-fingered haulout pier for a 660-ton boat hoist. The original concept and budget were based on plans for a 300-ton boat hoist, but the Port decided to increase its program to include a larger hoist. This presented some challenges in terms of balancing design



needs against limited budgets and an existing in-water work permit. Through creative design effort and effective constructability input, our team was able to negotiate an adjusted permit and provide a very economical pier structure for the Port of Toledo.

The support system consists of 24" diameter (maximum allowed by permit) driven steel piles that penetrate into the dense siltstone. Steel bracing was added to the piles to provide additional lateral stability. The superstructure consists of large steel wide-flange beams, topped

with an 18" thick cast-in-place concrete slab. A plastic timber fender system was designed and installed to protect boats entering the slip. A steel curb was installed with UHMW facing to provide further protection for the vessels.

Due to very limited upland space, a pile-supported concrete apron was incorporated to allow adequate space for the hoist to maneuver. This eliminated the need for a future soldier pile wall to retain the adjacent hillside.

BergerABAM provided the structural design and GRI provided the geotechnical design. Bergerson Construction assisted during the design phase and ultimately constructed the project. Despite the very tight schedule for design and in-water work, the key deadlines were met. This facility has been a great addition to waterfront infrastructure in the central Oregon Coast region.

Name:	Bud Shoemake	Title:	Port Manager (Past)
Organization:	Port of Toledo	Email:	bud.shoemake@gmail.com
Telephone:	(541) 272-1201	Fax:	

Bergerson Construction



Contractor:	Bergerson Construction	Engineer:	BergerABAM
Project Title:	17 th Street Dock Reconstruction	Contract Number:	N/A
Award Date:	June 2012	Completion Date:	July 2013
Original Value:	\$4.35 Million	Final Value:	\$4.5 Million

17th Street Dock Reconstruction

Throughout its history, the City of Astoria has been the beneficiary of a strong U.S. Coast Guard presence, and has endeavored to support Coast Guard operations. For the past several decades, Coast Guard cutters have moored at the City's pier on the historic Astoria waterfront. Recently, the 17th Street Pier has been the home for the USCGC Alert and the USCGC Steadfast. However, this timber pier was aging and beyond its serviceable life. Replacement of this important waterfront facility was funded through a Connect Oregon grant to the City of Astoria. With this funding in place, the city hired BergerABAM to design a replacement structure designed to suit the needs of the U.S. Coast Guard. As this public facility is adjacent to the Columbia River Maritime Museum, public access was a key consideration in appearance and function.

Bergerson Construction was awarded the contract to remove and replace this pier through a public bidding process. After award, Bergerson's team worked with the City to save over \$100k through value engineering changes, which allowed the City to implement additional upgrades to the facility.

Key Experience Items

- **Marine Construction**
- **Piledriving in dense soils**
- **Precast Concrete**
- **Over-water concrete construction**
- **Utility Construction**
- **Security & Safety Coordination**
- **Project Coordination with Coast Guard operational activities**
- **Strict Environmental Requirements**

The 109 steel pipe piles were installed through a silty riverbed into the dense siltstone. Given restrictive in-water work requirements, Bergerson worked closely with the City to install all piles during a one month period, thus avoiding costly marine mammal monitoring. The entire pier was removed (including extraction of over 200 piles) over the next month to meet a very limited in-water work window.



The cast-in-place concrete pilecaps and prestressed deck slabs were installed over the next few months. Close coordination was necessary throughout the project to allow for installation of water, sewer, communications and electrical in a utility trench that was constructed in the concrete pier.

Bergerson Construction selected local contractors Clatsop Electric and JP Plumbing to install the utilities. Construction crews worked carefully to ensure public safety throughout the project.

OWNER CONTACT

Name:	Jeff Harrington	Title:	Public Works Director
Organization:	City of Astoria	Email:	jharrington@astoria.or.us
Telephone:	(503) 338-5177	Fax:	(503) 338-6538

Bergerson Construction, Inc.



Contractor:	Bergerson Construction	Owner:	Foss Maritime
Engineer:	PND Engineers	Completion Date:	April 2013
Original Contract:	\$1,325,000	Final Value:	\$1,354,700

Foss Maritime – Rainier Shipyard Bulkhead

The Foss Maritime shipyard located in Rainier, OR is situated on a small piece of waterfront property with excellent waterfront frontage. Foss hired Bergerson Construction to construct a new waterfront bulkhead that would expand their shipyard capabilities as they endeavored to construct numerous vessels to update their aging fleet of work boats. The new bulkhead also serves as a high capacity transload facility for transferring vessels from land to water or vice versa.

This project primarily consisted of constructing an OPEN CELL® Bulkhead designed and patented by PND Engineers. The new bulkhead consists of interlocking “flat” sheetpile with tail walls to anchor in to the upland soils. After the sheetpiles were installed, the cells were incrementally backfilled with sand in

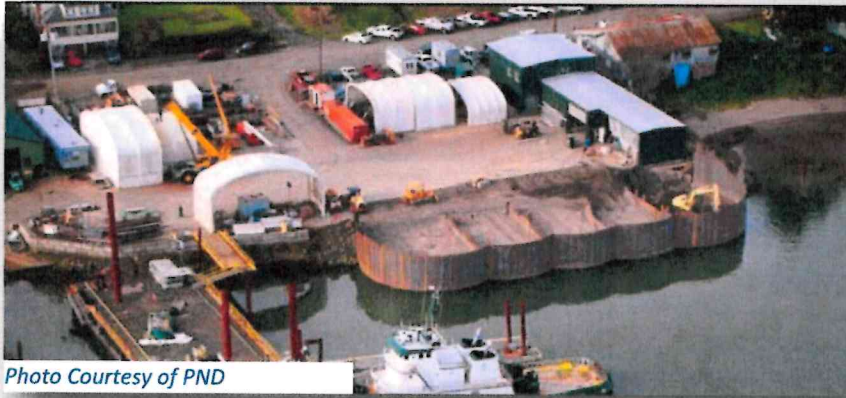


Photo Courtesy of PND

compacted layers. After backfill, a vibrocompaction probe was inserted repeatedly in a predetermined pattern to condense the soils under the structural fill. This process is an essential component of the construction process to minimize future settlement.

All earthwork for this project was subcontracted to Big River Construction from Astoria. After the bulkhead was completed, a separate contract was issued for construction of a concrete deck for construction of large vessels.

Name:	Rian Johnson	Title:	Principal
Organization:	PND Engineers	Email:	rjohnson@pndengineers.com
Telephone:	(206) 624-1387	Fax:	

ATTACHMENT B

4.2.3 Staffing & Staff Qualifications

Bergerson Construction, Inc.



GREGORY A. MORRILL | President



EDUCATION

George Fox University-
1987-1988, Area of
Concentration-Music

AWARDS

2017-DJC Oregon Project
of the Year – Sellwood
Bridge Replacement

2012-WSDOT Partnership
in Excellence in Contract
Administration

2011-Society of American
Military Engineers-Small
Business Design
Excellence Bronze Award

2008-Society of American
Military Engineers-Large
Business Design
Excellence Gold Award

CERTIFICATION

Level 1 First Aid and CPR
OSHA 30-Hour
Crane Operator safety
training

**Bergerson Construction,
Inc. Employee Since:**
1992

SELECTED RELEVANT PROJECT EXPERIENCE

USACE Columbia River King Pile Navigation Aids, Columbia River, OR – 2021

\$2.1 Million. Project consisted of installing steel “marker” piles with warning signage at the ends of 68 location on the Columbia River from Multnomah Falls to Westport, OR. Armor rock was placed underwater around each pile to reduce scouring from river currents.

Front Street Marine Bay Blvd Wharf, Newport, OR - 2019-2021

\$3.2 Million. Design-Build contract for construction of approximately 18,000 SF steel and concrete wharf for support of the seafood industry.

Georgia Pacific WAUNA Marine Structures Restoration, Westport, OR - 2020

\$2.4 Million. Removal of aging/failing waterfront structures. Installation of 48” diameter monopile dolphins, connecting truss walkways and new steel fender system. All work performed from the Columbia River with careful coordination on an active industrial waterfront.

Port of Grays Harbor Westport Marina Dredging – 2019-2020

\$1.5 Million. Hydraulic dredging of commercial/sport marina. Portions of the materials were unsuitable for in-water disposal. All materials were pumped into a settling pond up to 4,300 LF from the dredge area. After dredge sediments settled out, clean water was then discharged back into the bay.

Port of Everett Central Marina Improvements, Everett - 2014-2017

\$11.4 Million over three separate contracts. Revitalization of the Port’s Central Marina. Included environmental dredging, floating dock demolition and replacement, seawall demolition and replacement, utility construction, timber wharf construction and excavation.

Commercial Avenue Dock, Garibaldi, OR – 2013

\$4.2 Million replacement of failing timber wharf structure. New structure consisted of steel pipe piles driven through varying layers of incompetent soils, cast-in-place pile caps, precast deck, CIP deck & surface features, steel fender system, riprap slope protection, and a new deck crane.

17th Street Dock Reconstruction, Astoria, OR – 2012

\$4.4 Million replacement of an aging timber pier. New structure consisted of steel pipe piles driven into dense substrate, cast-in-place concrete pile caps, precast

deck slabs, CIP concrete deck & surface features, extensive electrical and plumbing, and shoreline protection.

Commercial Dock Facility, The Dalles, OR -2011

\$2.9 Million construction of a new pier consisting of steel pipe piles drilled through silty soils and rock-socketed into underlying basalt, cast-in-place pile caps and deck, precast deck, architectural concrete, electrical, plumbing, floating dock and gangways

WLB Pier Renovation, Tongue Point, Astoria, OR – 2008

\$5.1 Million reconstruction of 18,000 square foot buoy tender pier consisting of a critical upgrade to the operations of the WLB Fir with tight environmental and schedule requirements. Included driven steel piles, substantial structural steel precast concrete, CIP concrete, and utilities

USCG Neah Bay Breakwater, USCG Station Neah Bay, WA - 2009, \$3.3 Million breakwater structure consisting of Pipe pile supported pre-stressed concrete panels with poured-in-place concreted pile caps, sitting on rip rap base.

Piers 24-25 Rehab & Embankment Capping, Port of Tacoma, WA – 2007

\$6.9 Million structural rehabilitation of Piers 24 and 25 with environmental capping of submerged under-pier soils. Work was performed under the direction of the Port of Tacoma, the Corps of Engineers and the EPA. This project took place on an active pier with little laydown area and was subject to highly restrictive environmental requirements.

Boat Haven Marina Upgrade, Port of Port Angeles, Washington – 2007

\$5.7 Million upgrade to the marina consisting of reconfiguration and installation of new concrete floats connected to new pipe pile. Project included upgrade to electrical, water and fire system.

USCG Station Yaquina Bay - 2006, \$1.9 Million replacement of aging portion of Coast Guard pier. Project included demolition of timber and concrete pier structure, steel pile installation, cast-in-place concrete pilecaps, precast and cast-in-place concrete deck system, utility reconfiguration and environmental oversight.

Port of Portland, Terminal 4, Berth 415 Steel Dock Modifications - 2003

\$10 Million conversion of existing pier for Toyota's new facility. Work included construction of mooring and breasting dolphins for auto ships, upgrading existing fender system, and providing marine support as required for other contractors on the project.



ADAM NEHRING | Lead Estimator/Project Manager



EDUCATION

Oregon State University-
B.S. Construction
Engineering Management

AWARDS

2012-WSDOT Partnership
in Excellence in Contract
Administration

CERTIFICATION

Level 1 First Aid and CPR
OSHA 30-Hour
USACE CQC Trained

**Bergerson Construction,
Inc. Employee Since:**
2009

SEELCTED RELEVANT PROJECT EXPERIENCE

North Marina Parking Lot Bulkhead & Restroom, Des Moines, WA – 2022

\$9.6 Million This project consisted replacement of an aging treated timber pile bulkhead with installation of nearly 1,000 LF of sheetpile wall with drilled tiebacks. The sheetpile were capped with a large CIP concrete cap and an architectural concrete walkway & pedestrian barrier. A new sheetpile combi wall with concrete cap was installed to replace an aging timber breakwater structure that protects the marina. The adjacent parking lot was reconfigured to accommodate a plaza featuring architectural concrete planters, nautical beacon and a mosaic map and compass rose. A new, state-of-the-art restroom facility was also added to this site. All work was completed while maintaining pedestrian access through the construction zone to a popular fishing pier.

Port of Grays Harbor Westport Marina Dredging, Westport, WA – 2019

\$1.4 Million This project consisted of maintenance dredging of a very active marina that had not been dredged in decades. Large portions of the dredge materials were unsuitable for in-water placement. A large containment pond was constructed, and the dredge materials were pumped into that pond. Due to contaminated materials, our team had to work closely with USACE and Dept. of Ecology to ensure environmental protection. Over 60,000 CY of materials were removed from between the moorage slips while maintaining access for commercial and recreational vessels.

Port of Everett Central Marina Improvements, Everett – 2014-2017

\$11.4 Million over three separate contracts. Revitalization of the Port's Central Marina. Included environmental dredging, floating dock demolition and replacement, seawall demolition and replacement, utility construction, timber wharf construction and excavation.

Commercial Avenue Dock, Garibaldi, OR – 2013

\$4.2 Million replacement of failing timber wharf structure. New structure consisted of steel pipe piles driven through varying layers of incompetent soils, cast-in-place pile caps, precast deck, CIP deck & surface features, steel fender system, riprap slope protection, and a new deck crane.

WSDOT US 101 Simpson Ave. Bridge Pier 2 Stabilization – 2012

\$4.2 Million Retrofit of failing pier foundation on the Hoquiam River. This project included drilled shafts, concrete caisson construction, substantial underwater work, tremie-placed concrete, temporary cofferdams and structural concrete. A

new pier fendering system was installed after the structural repairs to the pier were completed.

Port of Longview Berth 9 Grain Facility, Longview, WA – 2010

\$5.5 Million Construction of a new waterfront grain terminal consisting of a series of dolphins, platforms, trestles and walkways. The pipe pile for this project ranged from 18" to 36" in diameter with lengths exceeding 170' in plumb and battered positions. Cast in place concrete formed the dolphin and platform structures. Structural steel trestles between the concrete structures required a high degree of accuracy to ensure proper fit.

Nippon Paper New Ocean Outfall, Port Angeles, WA – 2011

\$1.6 Million Construction of a new ocean outfall into the Straits of Juan de Fuca. This project consisted of design and construction of a temporary work trestle, design and construction of a sheet pile cofferdam, excavation & backfill of submerged soils, installation of HDPE outfall pipe using divers, and reconstruction of stone revetment.

USCG Neah Bay Breakwater, USCG Station Neah Bay, WA – 2010

\$3.4 Million Construction of a new 230' long Breakwater for USCG Station Neah Bay. Consisted of the installation of 14" H-Piles and 20" diameter battered pipe piles, underwater rock placement for rubble mound, underwater installation of pre-cast concrete panels, cast-in-place concrete pile cap. This work was performed using a sectional barge system supporting the crane and construction equipment.

USACE Webb Wildlife Mitigation, Clatskanie, OR – 2007

\$5.1 Million Construction of 30 acres of new wetlands behind existing dikes, construction of 3 new tide gate structures, design and construction of a new flood control pumping facility.



MICHAEL D. PUCKETT | Superintendent / Vice President



EDUCATION

Oregon Institute of Technology- Klamath Falls, OR
AGC Project Management Training- Texas
Quality Control Management- US Army Corps of Engineers

CERTIFICATION

Level 1 First Aid and CPR
NCCCO Certified Crane Operator
OSHA 30-Hour
HAZWOPER 40
USACE CQC Trained

Bergerson Construction, Inc. Employee Since:
1985

SELECTED RELEVANT PROJECT EXPERIENCE

USACE Columbia River King Pile Navigation Aids, Columbia River, OR – 2021

\$2.1 Million. Project consisted of installing steel “marker” piles with warning signage at the ends of 68 location on the Columbia River from Multnomah Falls to Westport, OR. Armor rock was placed underwater around each pile to reduce scouring from river currents.

Port of Everett Central Marina Improvements – 2014-2017

\$10.4 Million (over 3 phases) Replacement of failing timber seawall with new sheetpile with concrete cap and deadman wall tieback system; remove and reinstall existing floating docks; furnish & install new concrete floating dock & guide piles; environmental cleanup; new steel and timber wharf structure; new marina utilities.

Commercial Avenue Dock, Garibaldi, Oregon— 2013

\$4.2 Million Replacement of failing timber wharf structure. New structure consisted of steel pipe piles driven through varying layers of incompetent soils, cast-in-place pilecaps, precast deck, CIP deck & surface features, steel fender system, riprap slope protection, and a new deck crane.

Commercial Dock Facility The Dalles, OR— 2011

\$2.9 Million Construction of a new pile-supported concrete pier, steel mooring dolphins, and floating dock system. All piles on this project required drilling through soft soils and into the underlying basalt for rock-sockets. A concrete plaza area was constructed at the entrance to the pier. Utilities were installed in the plaza area and out to the face of the new pier.

Port of Longview Berth 9 Grain Facility Longview, WA—

\$5.5 Million Construction of a new waterfront grain terminal consisting of a series of dolphins, platforms, trestles and walkways. The pipe pile for this project ranged from 18” to 36” in diameter with lengths exceeding 170’ in plumb and battered positions. Cast in place concrete formed the dolphin and platform structures. Structural steel trestles between the concrete structures required a high degree of accuracy to ensure proper fit.

Port of Longview Berth 9 Grain Facility Longview, WA— 2010

\$5.5 Million Construction of a new waterfront grain terminal consisting of a series of dolphins, platforms, trestles and walkways. The pipe pile for this project

ranged from 18" to 36" in diameter with lengths exceeding 170' in plumb and battered positions. Cast in place concrete formed the dolphin and platform structures. Structural steel trestles between the concrete structures required a high degree of accuracy to ensure proper fit.

Boat Haven Marina, Port of Port Angeles, Port Angeles, WA – 2007

\$5.3 Million Partial replacement of this very active marina was split into phases in order to maintain continuous service for marina tenants. This project consisted of demolition of existing floats, piles, and utilities; construction of a new concrete floating dock system and associated guide piles; new gangways and approaches to the marina; replacement of electrical, fire system, and potable water.

RGS Structures, Inc.



COMPANY DESCRIPTION

Summary

RGS Structures, Inc is a specialty subcontractor that performs structural concrete, site concrete, structural wood framing, and seismic upgrades on commercial construction projects and public infrastructure improvements. We are headquartered in Astoria, Oregon with an exclusive focus on coastal projects from Tillamook to the south to the cities and towns in the Long Beach Peninsula in Washington to the north. Our project size ranges from \$100,000 to in excess of \$3 million. The three owners of RGS are active in the business with each having more than 25 years of experience in commercial construction throughout Oregon and coastal communities in the Pacific Northwest.

History



RGS was founded in early 2022 in Astoria. The company combines the skills and experience of three (3) industry professionals – Ryan Helligso, Geoff McGraw, and Steve Anderson. Our early history has followed a strategic approach to building an internal organization based on safety, long-term profitability, and a commitment to the coastal communities.

Safety

Performing our work in a safe manner is the highest priority of RGS. Our commitment to pre-task planning, effectively utilizing our comprehensive safety manual, and the personal commitment of leadership to the program, has created a company culture that embraces safety. Additionally, through our membership in Associated General Contractors (AGC), and our well-established relationships with leaders throughout the regional construction community, RGS is recognized as an industry leader in the area of safety.

Key Personnel

Geoff McGraw - President

Geoff studied Construction Management at Oregon State University and has worked for some of Oregon's largest commercial contractors since 1998. His most noteworthy projects included work on multiple health care campuses in the Portland metro area, over \$50 million worth of seismic upgrades to school district facilities in Portland, Clackamas, and Sherwood, historic preservation projects, and the CMH cancer center facility in Astoria. Since 2017 Geoff has focused exclusively on the estimating and project management for structural concrete, wood framing, and seismic upgrade projects valued between \$50,000 and \$4 million.

Ben Schultz - Field Supervisor



As a journeyman carpenter, Ben is adept at planning, building, and managing all facets of concrete work, structural wood framing, and seismic upgrades. His local projects include structural concrete and seismic upgrades at Columbia, Towler, and Patriot Halls at Clatsop Community College in Astoria, a \$1.3 million structural concrete project for the Scoular Fish Processing new facility at the Port of Astoria, over \$700,000 worth of structural and site concrete at the Snow Peak campground project in Ilwaco, and a wide variety of concrete and carpentry work at the CMH Cancer Center in Astoria. Other significant projects include a \$4.4 million concrete and wood-framing project at DeLaSalle High School in Portland and a \$2.9 million structural concrete project at Poynter Middle School in Hillsboro. Ben's capabilities also include mentoring of entry-level tradespeople to provide them valuable construction skills. Since joining RGS in 2022, Ben is the leader of our on-site crews.

Qualified Tradespeople

RGS is signatory to carpentry and labor trade unions that serve the northern Oregon coast and the Long Beach peninsula in Washington. These agreements provide the company with benefits in the areas of safety, training, resource management, schedule adherence, and craftsmanship. Our union affiliation allows RGS to tailor the crew size on all of our projects to be most efficient while "ramping up" in quick order when needed.



Steve Anderson – Preconstruction Manager

Qualifications

Steve began his construction career in the mid 1980's after graduating from the University of Cincinnati with a Bachelor of Science degree in Civil Engineering. Upon his move to Portland in 1996, he worked for nearly a decade for one of the region's most-respected commercial general contractors with a market focus in CM/GC and negotiated projects ranging from a few thousand dollars to in excess of \$100 million. From 2005 until 2021 he was an Owner, Project Executive, and Director of Preconstruction Services for a Portland-based general contractor that specialized in public facility and infrastructure projects constructed under CM/GC and Design-Build contracts. In early 2022 Steve and his family moved full time to Gearhart, Oregon. Since that time Steve has formed Oregon Coastal Group, a consulting firm that specializes in project planning and estimating exclusively for coastal projects and is majority owner and Vice President for RGS Structures, a specialty subcontractor in the areas of concrete, wood framing, and seismic upgrades. His ties to the Astoria community run deep.

Credentials

- 37 years in commercial construction
- Bachelor of Science Degree in Civil Engineering
- Master of Business Administration (MBA)
- Expertise in public contracting in Oregon
- Recognized as a leader in CM/GC projects
- DBIA Design-Build Associate
- Full-time resident of Gearhart, Oregon

References

Mr. Al Jaques
Construction Manager
(503) 791-7253

Ms. Ann Gyde
Construction Manager
(503) 468-9970

Mr. Tom Archer
PBS Engineering & Environmental
(503) 539-1777

Mr. Sid Scott
Scott Edwards Architecture
(503) 819-2136

Representative CM/GC Projects

CCC Jerome Campus Expansion and Patriot Hall Redevelopment – Astoria, Oregon

These multi-phased **CM/GC** projects, completed in 2011 and 2019 respectively, were constructed on the occupied campus of Clatsop Community College in downtown Astoria. Total construction cost was \$37 million over the total of four (4) years of work on site. Significant site challenges presented to the team were proactively solved during the 12 months of preconstruction services.

CMH/OHSU Knight Cancer Collaborative Facility – Astoria, Oregon

The **CM/GC** project was completed for Columbia Memorial Hospital (CMH) in 2019 at a cost of \$16 million. The work involved design of a new, state-of-the-art cancer treatment facility on the site of the football field previously utilized by the Astoria Fishermen. Great pride was taken in the local involvement and personal commitment by suppliers, subcontractors, and trade personnel

CMH Field – Astoria, Oregon

The **CM/GC** project involved construction of a new synthetic turf athletic field, grandstands, and a locker room facility on a five (5) acre site previously utilized as a landfill in Astoria for decades. The work was performed in accordance with a multi-party agreement between CMH, Astoria School District, the City of Astoria, and Western Oregon Waste.

Vernonia School District New K-12 Facility – Vernonia, Oregon

Completed in 2010, the \$28 million **CM/GC** project involved construction of a new 125,000 sf school building built to LEED platinum requirements. This public project gained state and national attention for its innovative approach to delivering a much-needed school and community center only a few years after the devastating flooding throughout the City of Vernonia.

City of Lake Oswego Public Works Facility – Lake Oswego, Oregon

The \$12 million, **CM/GC** project involved construction of a two (2) new concrete tilt up facilities totaling over 35,000 sf and complete redevelopment of the existing site. The City's service and maintenance departments remained fully functional during the 14 months of construction; even during one of the area's most significant winter storms in 2016.

Scappoose High School Addition, Improvements, and Seismic Upgrades – Scappoose, Oregon

Completed via **CM/GC** method of contracting, the \$13 million project involved a 15,000 sf performance center addition, extensive improvements throughout the existing 110,000 sf high school, and seismic strengthening to noteworthy portions of the circa 1980's facility. All work was completed while the school remained fully occupied over the span of 19 months

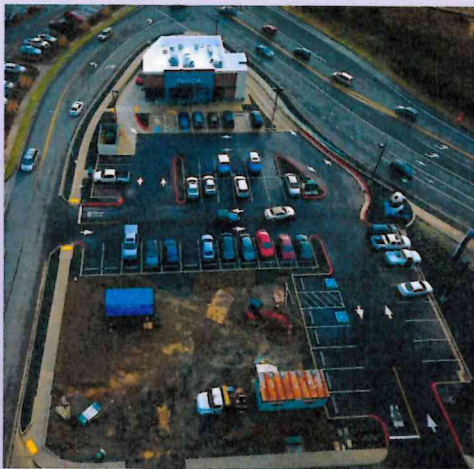
Big River Construction, Inc.

Project Team Member

Tony Ewing is a founding member of Big River Construction, and has helped the company grow to over 50 employees, averaging a little over 15 million dollars in sales revenue annually. His decades of experience, knowledge, and know-how have all contributed to a well operating outfit where the company has made a significant footprint along the north coast in Oregon up into Washington.

He has managed many projects in and around water including rivers, lakes, wetlands, parks, beaches, marinas, and ports. These jobs have also been completed for each level of government along with private sector clients. Some of the recent projects were for the Oregon Department of Fish and Wildlife and the Bureau of Land Management.

For the Astoria Pier 2 Rehabilitation Project, he will be offering owner oversight from a management perspective, assisting the team with ideas and direction to accomplish the job as efficiently as possible.





Recent Projects

Bible Creek Culvert Replacement Beaver, OR

Owner
Bureau of Land Management

Contact
Matthew Gilger
303-236-5396

Contract amount
\$1,479,199

Duration
Spring-fall of 2022

This project consisted of the replacement of 31 stream crossing and road drainage culverts within BLM/National Forest property. The largest culvert installed was 96 inches in diameter and 120 feet long, and the outlet of this culvert was over 60 feet below the road surface. Associated work included clearing and grubbing, temporary stream bypass, and asphalt paving.

Klaskanine Fish Hatchery Intake 2 Fish Passage Astoria, OR

The scope of work for this project included the installation of a stream simulation boulder/gravel matrix to rebuild the stream gradient on a 35 ft wide stream. This installation created a 360 linear feet of roughened channel to improve salmon habitat and allow for fish and other aquatic species passage over a concrete dam. The work also included partial demolition and modification to the existing dam, installation and removal of a gravity stream bypass, rip rap placement to protect a state highway bridge foundation, and permanent seeding.

Owner
Oregon Department of
Fish and Wildlife

Contact
Kregg Smith
503-779-8212

Contract amount
\$424,770

Duration
Summer-fall of 2022

Recent Projects

Klaskanine River Bridge Replacement Astoria, OR

The scope of this project is the replacement of an existing bridge over the Klaskanine River. As a sub-contractor, we performed approximately 1,800 cubic yards of in-water streambed excavation, 390 cubic yards of class 200 rip rap placement as well as large woody debris placement to reconstruct the river channel to accommodate the new bridge alignment. Associated work included road prism reconstruction, clearing and grubbing and drainage improvements.

Owner
 Clatsop County Public Works

GC Contact
 Craig Gries
 503-767-6722

Owner Contact
 Dean Keranen
 503-325-8631

Contract amount
 \$429,980

Duration
 Summer 2022-Current

Owner
 Astoria Wetland, LLC

Contact
 Duncan Heyward
 804-330-8094

Contract amount
 \$464,855.00

Duration
 August–October 2015

Wallooskee Confluence Astoria, OR

This project involved the modification of existing levees and ditches to restore tidal marsh for salmon and steelhead restoration in the lower Columbia river estuary. The project included tidal channel excavation, spoils placement and related grading, vegetation management to improve conditions for native species, levee breaching, tide gate removal, levee lowering, and fish salvage.



ATTACHMENT C

4.2.5.1 Project Costs – Preconstruction Fee

4.2.5.1 Project Costs – Construction Fee

Proposer Certification Statement

Bid Bond

Request for Proposals - Port of Astoria Pier 2 West Rehabilitation

Schedule RS.1B - Project Cost Matrix: Fees

Cost Category	Amount
Preconstruction Fee Total (dollar amount)	\$215,300
Costs and Expenses	see attached
Labor	see attached
Construction Fee (percentage of Cost of Work)	9.5%



Port of Astoria

Pier 2 CMGC Preconstruction Services

Item #	Description	QTY	UNIT	UNIT PRICE	TOTAL
1	Project Meetings (Weekly for 52 Weeks)				
2	Principal	100	HR	\$ 140	\$ 14,000
3	Project Manager/Estimator	100	HR	\$ 110	\$ 11,000
4	Precon Services Manager	100	HR	\$ 130	\$ 13,000
5	Constructability Reviews				
6	Principal	60	HR	\$ 140	\$ 8,400
7	Project Manager/Estimator	80	HR	\$ 110	\$ 8,800
8	Precon Services Manager	40	HR	\$ 130	\$ 5,200
9	Superintendent	30	HR	\$ 105	\$ 3,150
10	Earthwork Contractor	40	HR	\$ 125	\$ 5,000
11	Concrete Contractor	20	HR	\$ 110	\$ 2,200
12	Micropile Contractor	20	HR	\$ 110	\$ 2,200
13	Utility Contractors	20	HR	\$ 110	\$ 2,200
14	Environmental Permitting Review				
15	Principal	40	HR	\$ 140	\$ 5,600
16	Project Manager/Estimator	15	HR	\$ 110	\$ 1,650
17	Precon Services Manager	15	HR	\$ 130	\$ 1,950
18	30% Schematic Design (SD) Review & Estimate				
19	Principal	30	HR	\$ 140	\$ 4,200
20	Project Manager/Estimator	80	HR	\$ 110	\$ 8,800
21	Precon Services Manager	30	HR	\$ 130	\$ 3,900
22	Earthwork Contractor	30	HR	\$ 125	\$ 3,750
23	Concrete Contractor	20	HR	\$ 110	\$ 2,200
24	Micropile Contractor	20	HR	\$ 110	\$ 2,200
25	Utility Contractors	20	HR	\$ 110	\$ 2,200
26	Value Engineering & Alternate Design Reviews				
27	Principal	25	HR	\$ 140	\$ 3,500
28	Project Manager/Estimator	40	HR	\$ 110	\$ 4,400
29	Precon Services Manager	25	HR	\$ 130	\$ 3,250
30	Superintendent	20	HR	\$ 110	\$ 2,200

Item #	Description	QTY	UNIT	UNIT PRICE	TOTAL
31	60% Design Development (DD) Review & Estimate				
32	Principal	30	HR	\$ 140	\$ 4,200
33	Project Manager/Estimator	80	HR	\$ 110	\$ 8,800
34	Precon Services Manager	30	HR	\$ 130	\$ 3,900
35	Earthwork Contractor	30	HR	\$ 125	\$ 3,750
36	Concrete Contractor	15	HR	\$ 110	\$ 1,650
37	Micropile Contractor	10	HR	\$ 110	\$ 1,100
38	Utility Contractors	10	HR	\$ 110	\$ 1,100
39	90% Construction Documents (CD) Review & Estimate Refinement				
40	Principal	30	HR	\$ 140	\$ 4,200
41	Project Manager/Estimator	50	HR	\$ 110	\$ 5,500
42	Precon Services Manager	20	HR	\$ 130	\$ 2,600
43	Develop Subcontractor Bid Packages, Solicit & Obtain Bids				
44	Principal	20	HR	\$ 140	\$ 2,800
45	Project Manager/Estimator	75	HR	\$ 110	\$ 8,250
46	Precon Services Manager	30	HR	\$ 130	\$ 3,900
47	Preparation of GMP Estimate				
48	Principal	40	HR	\$ 140	\$ 5,600
49	Project Manager/Estimator	70	HR	\$ 110	\$ 7,700
50	Precon Services Manager	30	HR	\$ 130	\$ 3,900
51	Superintendent	20	HR	\$ 110	\$ 2,200
52	Miscellaneous				
53	Printing, Digital Media, Software	1	LS	\$ 3,500	\$ 3,500
54	Advertising	1	LS	\$ 3,200	\$ 3,200
55	Legal	1	LS	\$ 12,500	\$ 12,500
				Preconstruction Services Total:	\$ 215,300

NOTE: The preconstruction cost total listed here shall be considered a Not-To-Exceed (NTE) amount for preconstruction services based on the entirety of the work as identified in the Port's Request for Proposals and our project approach as outlined in our RFP response. The Port will only be billed for actual work completed in accordance the CM/GC contract and per billable rates listed here.

**ADDENDUM RA.4
PROPOSER INFORMATION AND CERTIFICATION STATEMENT**

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of the Request for Proposals (RFP), including all attachments of whatever type.

OFFICIAL CONTACT: The Port requests that the Proposer designate one person as authorized to receive, on behalf of the Proposer, all communication from the Port of Astoria regarding the attached Proposal. Identify the Contact name and fill in the information below. Please print clearly.

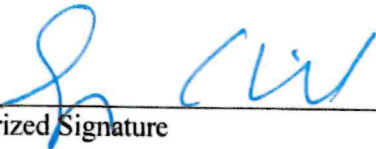
Legal Name of Proposer	Bergerson Construction, Inc.
Address	P.O. Box 387
City, State, Zip	Astoria, OR 97103
State of Entity Registration	Oregon
Entity Type	Domestic Business Corporation
Contact Name	Gregory A. Morrill
Phone	(503) 325-7130
Email	admin@bergerson-const.com
OR Business Registry No. (if applicable)	9539719

By its submission of this Proposal and authorized signature below, Proposer certifies to the following:

1. (a) The above information is true and correct and Proposer grants permission to the Port of Astoria to contact the above-named person (Contact Name) to verify the information contained therein and for all other purposes in connection with the Proposal. (b) The information contained within the Proposal is true and accurate.
2. (a) The Proposal has been developed independently, without consultation, communication or agreement with any employee, agent, or consultant to the Port. (b) The Proposal has been developed independently, without consultation, communication or agreement with any other Proposer or other parties for the purpose of restricting competition or any other illicit purpose. (c) No attempt has been made or will be made by the Proposer to induce any other Proposer to submit or not to submit a Proposal for the purpose of restricting competition. (d) No relationship exists or will exist during the contract period between Proposer and the Port or any other State agency that interferes with fair competition or constitutes a conflict of interest.
3. (a) Proposer acknowledges receipt of any and all addenda, exhibits, or other attachments to this RFP. (b) Proposer understands and accepts the procedures, evaluation criteria, and other requirements of this RFP. (c) If selected for award of the contract, Proposer agrees to the contract terms contained within the Construction Manager/General Contractor Services Agreement (Exhibit RE.1), except for those terms and conditions that Port has reserved for negotiation.

4. (a) Proposal is a Firm Offer for 180 days following the Closing. (b) If selected for award of the contract, Proposer agrees to be bound by the rates and fees submitted with this Proposal, including but not limited to the Preconstruction Fee and Construction Fee Rate.
5. Proposer is not in violation of any tax laws of the state or a political subdivision of the state that are itemized in ORS 305.380(4).
6.
 - (a) Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, gender, disability, sexual orientation, national origin. When awarding subcontracts, Proposer does not discriminate against any business certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business. If applicable, Proposer has, or will have prior to contract execution, a written policy and practice, that meets the requirements described in ORS 279A.112 (formerly HB 3060), of preventing sexual harassment, sexual assault and discrimination against employees who are members of a protected class. Agency may not enter into a contract with an anticipated contract price of \$150,000 or more with a Proposer that does not certify it has such a policy and practice. See <https://www.oregon.gov/DAS/Procurement/Pages/hb3060.aspx> for additional information and sample policy template.
 - (b) Proposer complies with ORS 652.220. If selected for award under this RFP, Proposer's continuing compliance with ORS 652.220 constitutes a material element of the contract entered into between Owner and CMGC ("Agreement") and failure to comply constitutes a breach that entitles The Port to terminate the Agreement for cause.
 - (c) The CMGC may not prohibit any of CMGC's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. CMGC may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.
7. Proposer and Proposer's employees, agents, and subcontractors are not included on:
 - A. the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>, or
 - B. the government wide exclusions lists in the System for Award Management found at: <https://www.sam.gov/portal/>
8. Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the Port, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. If any changes occur with respect to Proposer's status regarding conflict of interest, Proposer shall promptly notify the Port in writing.
9. Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the Oregon False Claims Act, ORS 180.750(1)}, subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.

10. Proposer certifies that neither it, nor any of its principals, (a) have been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal Agency or State Agency; (b) have within a three year period preceding this Proposal been convicted of, or had a civil judgment rendered against them for commission of fraud, a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of antitrust statutes; commission of embezzlement, theft, forgery, falsification or destruction of records, making false statements, or receiving stolen property; (c) are presently indicted for or criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in this certification; and (d) have not within a three year period preceding this Proposal had one or more public transactions (federal, state, or local) terminated for cause. This certification is a material representation of fact upon which the Port will rely in entering into any contract with the Proposer ("Agreement"). If it is later determined that Proposer knowingly rendered an erroneous certification, in addition to other remedies available, the Port may pursue available remedies including suspension, debarment, or termination of the Agreement.
11. Proposer acknowledges these certifications are in addition to any certifications required under the Contract.



Authorized Signature

Dec. 16, 2022

Date

Gregory A. Morrill, President
(Printed Name and Title)

Port of Astoria

BID BOND

KNOW ALL MEN BY THESE PRESENTS, that Travelers Casualty and Surety Company of America

a surety company duly organized under the laws of the State of Connecticut,

having its principal place of business at One Tower Sq., Hartford, CT 06183,

in the State of Connecticut, and authorized to do business in the State of Oregon is held and firmly bound unto the State of Oregon, in the full sum of ten (10) percent of the total amount of the bid for Preconstruction Phase services, as defined in the Proposal submitted by the Bidder for the rehabilitation of Pier 2 West under that Request for Proposals issued by the Port of Astoria on October 10, 2022, and the work as hereinafter described, for the payment of which, well and truly to be made, we bind ourselves, our heirs, executors, administrators and assigns, and successors and assigns, firmly by these presents.

The condition of this bond is such that, whereas Bergerson Construction, Inc.
(Bidder)

is herewith submitting its bid for the following work, to wit:

Pier 2 West Rehabilitation - CMGC Pre-Construction Services

said bid, by this reference being made a part hereof;

NOW THEREFORE, if the said bid submitted by the said bidder is accepted and the contract for said work is successfully negotiated and awarded to said bidder, and if the said bidder enters into and executes the said contract and furnishes bonds as required within the time required, then this obligation shall be void; otherwise to remain in full force and effect.

Signed and sealed this 12th day of December, 2022

Travelers Casualty and Surety Company of America
(Surety Company)


(Signature) Gregory C. Ryzowski, Attorney-in-Fact



**Travelers Casualty and Surety Company of America
Travelers Casualty and Surety Company
St. Paul Fire and Marine Insurance Company**

POWER OF ATTORNEY

KNOW ALL MEN BY THESE PRESENTS: That Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company are corporations duly organized under the laws of the State of Connecticut (herein collectively called the "Companies"), and that the Companies do hereby make, constitute and appoint **Gregory C. Ryerson**, of **Portland, Oregon**, their true and lawful Attorney-in-Fact to sign, execute, seal and acknowledge any and all bonds, recognizances, conditional undertakings and other writings obligatory in the nature thereof on behalf of the Companies in their business of guaranteeing the fidelity of persons, guaranteeing the performance of contracts and executing or guaranteeing bonds and undertakings required or permitted in any actions or proceedings allowed by law.

IN WITNESS WHEREOF, the Companies have caused this instrument to be signed, and their corporate seals to be hereto affixed, this **3rd** day of **February**, 2017.



State of Connecticut

City of Hartford ss.

By: *Robert L. Raney*
Robert L. Raney, Senior Vice President

On this the **3rd** day of **February**, 2017, before me personally appeared **Robert L. Raney**, who acknowledged himself to be the Senior Vice President of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, and that he, as such, being authorized so to do, executed the foregoing instrument for the purposes therein contained by signing on behalf of the corporations by himself as a duly authorized officer.

In Witness Whereof, I hereunto set my hand and official seal.

My Commission expires the **30th** day of **June**, 2021



Marie C. Tetreault
Marie C. Tetreault, Notary Public

This Power of Attorney is granted under and by the authority of the following resolutions adopted by the Boards of Directors of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, which resolutions are now in full force and effect, reading as follows:

RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President, any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary may appoint Attorneys-in-Fact and Agents to act for and on behalf of the Company and may give such appointee such authority as his or her certificate of authority may prescribe to sign with the Company's name and seal with the Company's seal bonds, recognizances, contracts of indemnity, and other writings obligatory in the nature of a bond, recognizance, or conditional undertaking, and any of said officers or the Board of Directors at any time may remove any such appointee and revoke the power given him or her; and it is

FURTHER RESOLVED, that the Chairman, the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President may delegate all or any part of the foregoing authority to one or more officers or employees of this Company, provided that each such delegation is in writing and a copy thereof is filed in the office of the Secretary; and it is

FURTHER RESOLVED, that any bond, recognizance, contract of indemnity, or writing obligatory in the nature of a bond, recognizance, or conditional undertaking shall be valid and binding upon the Company when (a) signed by the President, any Vice Chairman, any Executive Vice President, any Senior Vice President or any Vice President, any Second Vice President, the Treasurer, any Assistant Treasurer, the Corporate Secretary or any Assistant Secretary and duly attested and sealed with the Company's seal by a Secretary or Assistant Secretary; or (b) duly executed (under seal, if required) by one or more Attorneys-in-Fact and Agents pursuant to the power prescribed in his or her certificate or their certificates of authority or by one or more Company officers pursuant to a written delegation of authority; and it is

FURTHER RESOLVED, that the signature of each of the following officers: President, any Executive Vice President, any Senior Vice President, any Vice President, any Assistant Vice President, any Secretary, any Assistant Secretary, and the seal of the Company may be affixed by facsimile to any Power of Attorney or to any certificate relating thereto appointing Resident Vice Presidents, Resident Assistant Secretaries or Attorneys-in-Fact for purposes only of executing and attesting bonds and undertakings and other writings obligatory in the nature thereof, and any such Power of Attorney or certificate bearing such facsimile signature or facsimile seal shall be valid and binding upon the Company and any such power so executed and certified by such facsimile signature and facsimile seal shall be valid and binding on the Company in the future with respect to any bond or understanding to which it is attached.

I, **Kevin E. Hughes**, the undersigned, Assistant Secretary of Travelers Casualty and Surety Company of America, Travelers Casualty and Surety Company, and St. Paul Fire and Marine Insurance Company, do hereby certify that the above and foregoing is a true and correct copy of the Power of Attorney executed by said Companies, which remains in full force and effect.

Dated this 12th day of December, 2022



Kevin E. Hughes
Kevin E. Hughes, Assistant Secretary

**To verify the authenticity of this Power of Attorney, please call us at 1-800-421-3880.
Please refer to the above-named Attorney-in-Fact and the details of the bond to which the power is attached.**

ATTACHMENT D (Separate Envelope)

4.2.5.2 Project Costs – Cost of Work

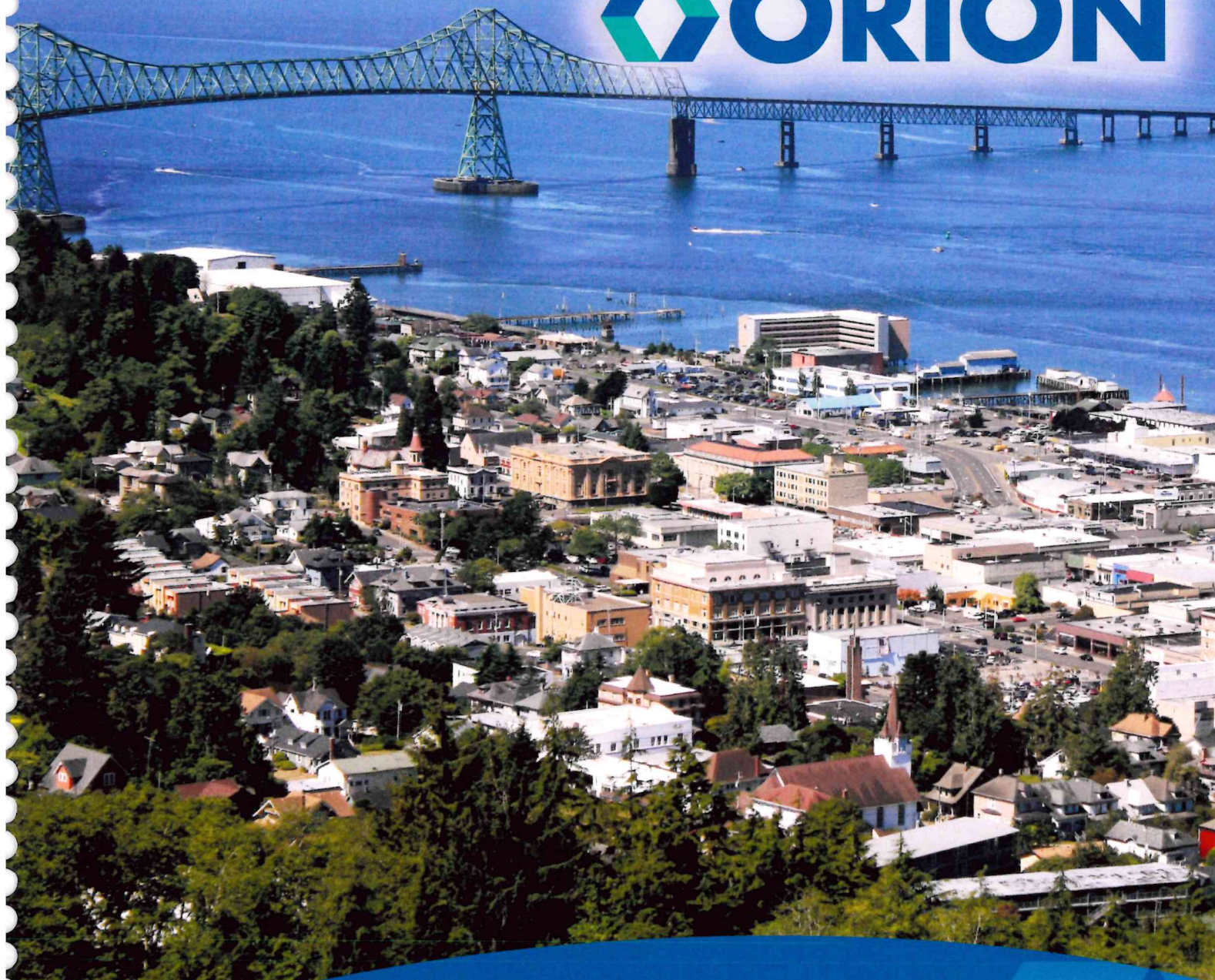
4.2.5.3 Project Schedule

TECHNICAL PROPOSAL

December 16, 2022

Construction Manager/General Contractor Services
Pier 2 West Rehabilitation

Port of Astoria | Astoria, OR



**DESIGN.
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**ADDENDUM RA.4
PROPOSER INFORMATION AND CERTIFICATION STATEMENT**

The undersigned hereby acknowledges she/he has read and understands all requirements and specifications of the Request for Proposals (RFP), including all attachments of whatever type.

OFFICIAL CONTACT: The Port requests that the Proposer designate one person as authorized to receive, on behalf of the Proposer, all communication from the Port of Astoria regarding the attached Proposal. Identify the Contact name and fill in the information below. Please print clearly.

Legal Name of Proposer	Orion Marine Contractors, Inc.
Address	Corporate Address: 12000 Aerospace Ave., Suite 300 Physical Address: 1112 East Alexander Ave.
City, State, Zip	Corporate Address: Houston, TX 77034 Physical Address: Tacoma, WA 98421
State of Entity Registration	Delaware
Entity Type	Corporation
Contact Name	Brian Masten
Phone	253.552.1159
Email	bmasten@orionmarinegroup.com
OR Business Registry No. (if applicable)	

By its submission of this Proposal and authorized signature below, Proposer certifies to the following:

1. (a) The above information is true and correct and Proposer grants permission to the Port of Astoria to contact the above-named person (Contact Name) to verify the information contained therein and for all other purposes in connection with the Proposal. (b) The information contained within the Proposal is true and accurate.

2. (a) The Proposal has been developed independently, without consultation, communication or agreement with any employee, agent, or consultant to the Port. (b) The Proposal has been developed independently, without consultation, communication or agreement with any other Proposer or other parties for the purpose of restricting competition or any other illicit purpose. (c) No attempt has been made or will be made by the Proposer to induce any other Proposer to submit or not to submit a Proposal for the purpose of restricting competition. (d) No relationship exists or will exist during the contract period between Proposer and the Port or any other State agency that interferes with fair competition or constitutes a conflict of interest.

3. (a) Proposer acknowledges receipt of any and all addenda, exhibits, or other attachments to this RFP. (b) Proposer understands and accepts the procedures, evaluation criteria, and other requirements of this RFP. (c) If selected for award of the contract, Proposer agrees to the contract terms contained within the Construction Manager/General Contractor Services Agreement (Exhibit RE.1), except for those terms and conditions that Port has reserved for negotiation.

4. (a) Proposal is a Firm Offer for 180 days following the Closing. (b) If selected for award of the contract, Proposer agrees to be bound by the rates and fees submitted with this Proposal, including but not limited to the Preconstruction Fee and Construction Fee Rate.
5. Proposer is not in violation of any tax laws of the state or a political subdivision of the state that are itemized in ORS 305.380(4).
6.
 - (a) Proposer does not discriminate in its employment practices with regard to race, creed, age, religious affiliation, gender, disability, sexual orientation, national origin. When awarding subcontracts, Proposer does not discriminate against any business certified under ORS 200.055 as a disadvantaged business enterprise, a minority-owned business, a woman-owned business, a business that a service-disabled veteran owns or an emerging small business. If applicable, Proposer has, or will have prior to contract execution, a written policy and practice, that meets the requirements described in ORS 279A.112 (formerly HB 3060), of preventing sexual harassment, sexual assault and discrimination against employees who are members of a protected class. Agency may not enter into a contract with an anticipated contract price of \$150,000 or more with a Proposer that does not certify it has such a policy and practice. See <https://www.oregon.gov/DAS/Procurement/Pages/hb3060.aspx> for additional information and sample policy template.
 - (b) Proposer complies with ORS 652.220. If selected for award under this RFP, Proposer's continuing compliance with ORS 652.220 constitutes a material element of the contract entered into between Owner and CMGC ("Agreement") and failure to comply constitutes a breach that entitles The Port to terminate the Agreement for cause.
 - (c) The CMGC may not prohibit any of CMGC's employees from discussing the employee's rate of wage, salary, benefits, or other compensation with another employee or another person. CMGC may not retaliate against an employee who discusses the employee's rate of wage, salary, benefits, or other compensation with another employee or another person.
7. Proposer and Proposer's employees, agents, and subcontractors are not included on:
 - A. the "Specially Designated Nationals and Blocked Persons" list maintained by the Office of Foreign Assets Control of the United States Department of the Treasury found at: <https://www.treasury.gov/ofac/downloads/sdnlist.pdf>, or
 - B. the government wide exclusions lists in the System for Award Management found at: <https://www.sam.gov/portal/>
8. Proposer certifies that, to the best of its knowledge, there exists no actual or potential conflict between the business or economic interests of Proposer, its employees, or its agents, on the one hand, and the business or economic interests of the Port, on the other hand, arising out of, or relating in any way to, the subject matter of the RFP. If any changes occur with respect to Proposer's status regarding conflict of interest, Proposer shall promptly notify the Port in writing.
9. Proposer understands that any statement or representation it makes, in response to this RFP, if determined to be false or fraudulent, a misrepresentation, or inaccurate because of the omission of material information could result in a "claim" {as defined by the Oregon False Claims Act, ORS 180.750(1)}, subject to the Oregon False Claims Act, ORS 180.750 to 180.785, and to any liabilities or penalties associated with the making of a false claim under that Act.

10. Proposer certifies that neither it, nor any of its principals, (a) have been debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by a Federal Agency or State Agency; (b) have within a three year period preceding this Proposal been convicted of, or had a civil judgment rendered against them for commission of fraud, a criminal offense in connection with obtaining, attempting to obtain, or performing a public (federal, state, or local) transaction or contract under a public transaction, violation of antitrust statutes; commission of embezzlement, theft, forgery, falsification or destruction of records, making false statements, or receiving stolen property; (c) are presently indicted for or criminally or civilly charged by a government entity (federal, state, or local) with the commission of any of the offenses enumerated in this certification; and (d) have not within a three year period preceding this Proposal had one or more public transactions (federal, state, or local) terminated for cause. This certification is a material representation of fact upon which the Port will rely in entering into any contract with the Proposer ("Agreement"). If it is later determined that Proposer knowingly rendered an erroneous certification, in addition to other remedies available, the Port may pursue available remedies including suspension, debarment, or termination of the Agreement.
11. Proposer acknowledges these certifications are in addition to any certifications required under the Contract.



Authorized Signature

December 16, 2022

Date

Brian Masten, Vice President
(Printed Name and Title)



1112 E. Alexander Ave.
Tacoma, WA 98421
253.552.1140

December 16, 2022

Matt McGrath, Deputy Director
Port of Astoria
422 Gateway Ave., Suite 100
Astoria, OR 97103

RE: Construction Manager/General Contractor (CM/GC) Services - Pier 2 West Rehabilitation

Dear Mr. McGrath:

Orion Marine Contractors, Inc. (Orion) is pleased to submit the enclosed offer to provide Preconstruction and Construction Phase services for the safe and efficient design and rehabilitation of Pier 2 West, as advertised by the Port of Astoria (Port) on October 10, 2022.

As background, Orion is a wholly owned subsidiary of Orion Group Holdings, Inc., a publicly traded company on the New York Stock Exchange (NYSE: ORN). Orion operates our activities from our West Coast regional office and marine facility in Tacoma, where we can mobilize all equipment necessary to rehabilitate Pier 2 West with minimal impact on the surrounding area or environment. This fleet of equipment is all owned, operated, and maintained by Orion to ensure its availability for use to perform this work.

Throughout our years of service, Orion has successfully deconstructed a wide variety of marine structures including container, break bulk and liquid transfer wharfs, military piers, bridges and causeways, and ferry terminals. Orion also offers an extensive range of specialty services knowledge and capabilities, including diving, inspections, encapsulation, repair, salvage, and surveying, among others.

For the execution of this project, Orion will assign a highly experienced team to collaborate with the Port in the development of a plan to safely provide CM/GC services both on time and under budget and with minimal disruption to ongoing harbor operations. This team brings significant experience working on piers, harbors, docks, and sea walls. Based on this experience, we will combine our local and regional knowledge and capability to establish an open and transparent approach with the Port to deliver a best-for-project solution that minimizes overall risk.

Orion has provided the enclosed proposal to provide CM/GC services as per the details requested in the RFP. However, should you need additional details or clarification regarding this information, please do not hesitate to contact me at the information provided below. Orion sincerely appreciates being considered for this opportunity and is committed to putting forward our proven team to work with the Port to establish the best path forward for the project.

Sincerely,

Orion Marine Contractors, Inc.

Brian Masten
Vice President, Operations - Pacific NW
bmasten@orionmarinegroup.com
206.786.9532

www.orionmarinegroup.com

Alaska ♦ Atlantic Seaboard ♦ Canada ♦ Caribbean Basin ♦ Gulf Coast ♦ West Coast

Orion Marine Contractors, Inc.
- Private & Confidential -

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Acknowledgment of Amendments

Orion acknowledges receipt, understanding, and full consideration of the RFP requirements and the following related amendments and clarifications issued by the Port:

- Amendment 1
- Amendment 2
- QA Response to Pre-Proposal Conference on October 20, 2022
- QA Response to Written Questions

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Section 1

Project Experience

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Qualifications & Experience




Similar Experience


Our proposed team members have extensive experience working together on projects with comparable scopes and project elements.

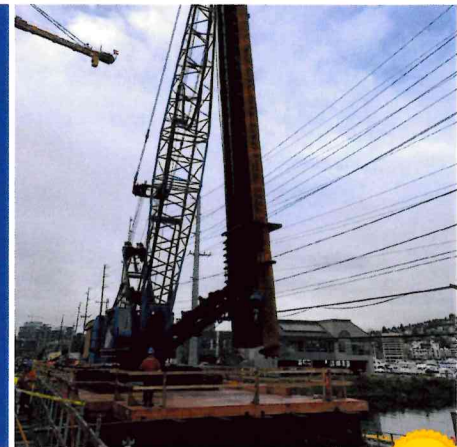
Similar Experience	Demolition	Timber Structure Removal	Bulkhead Installation	Protecting Existing Structures	Dredging	Pile Installation
 Fairview Avenue North Bridge Structure Replacement - City of Seattle/Seattle DOT	•	•		•		•
P-993 Transit Protection System, USCG Station Ediz Hook - NAVFAC NW	•		•		•	•
Unalakleet River Revetment, Phase III - USACE-Alaska District			•	•		•
 Mukilteo Terminal Trestle & Bridge Seat Construction - WA State DOT	•		•	•	•	•
UniSea G1 Dock Replacement UniSea, Inc.	•	•		•		•
Pier 4 Phase 1 Removal Action - Port of Tacoma	•	•		•	•	•
Mary's River Lumber Mill & Montesano WWTP Bank Stabilization - City of Montesano (sub to Stellar J Corp.)	•	•	•	•		•
 Pier 3 Upgrade - Port of Tacoma	•	•		•		•

Team Collaborative Experience

More than just a cumulative list of project experience, we offer the Port a seasoned team dynamic to deliver success for the Pier 2 West Rehabilitation CM/GC project.

Team Collaborative Project Experience	Brian Masten Project Executive	Justin Strong Area Manager	Bradley Morlock Project Manager	Cass Bruneau Cost Estimator	Jason Tarver General Superintendent
 Fairview Avenue North Bridge Structure Replacement - City of Seattle/Seattle DOT	•			•	•
P-993 Transit Protection System, USCG Station Ediz Hook - NAVFAC NW	•	•		•	
 Mukilteo Terminal Trestle & Bridge Seat Construction - WA State DOT	•			•	
UniSea G1 Dock Replacement - UniSea, Inc.		•			
Pier 4 Phase 1 Removal Action - Port of Tacoma	•	•		•	•
Mary's River Lumber Mill & Montesano WWTP Bank Stabilization - City of Montesano (sub to Stellar J Corp.)			•		•
 Pier 3 Upgrade - Port of Tacoma	•			•	

 Award-winning project



Fairview Avenue North Bridge Structure Replacement

City of Seattle/Seattle Department of Transportation - Seattle, WA

New Concrete Bridge

Orion was contracted by the Seattle Department of Transportation to replace the Fairview Avenue North bridge structure. Orion demolished the existing bridge which consisted of an eastern, concrete pile supported bridge built in 1964, and a western timber pile-supported bridge built in 1948. The team removed existing concrete rubble along the Lake Union shoreline and placed a cap of clean sand within the project area.

Orion replaced the existing bridge with a 540-foot-long and 67-foot-wide multi-span concrete bridge. The new bridge is supported by 3½-foot-diameter reinforced concrete bridge columns. Each column was constructed on a foundation consisting of an 8-foot-diameter drilled shaft installed to an approximate depth of 140 feet below the water surface elevation. The project also required relocation of above ground utilities as necessary to construct the project. Overhead transmission lines have been temporarily relocated to facilitate construction.

Stormwater treatment vaults equipped with Prefilter cartridge systems were installed at each approach to intercept and treat stormwater from the bridge deck. Orion self-performed the installation of the stormwater vaults with cartridge systems, conveyance piping, and outfalls where none existed. Historical land use practices required pre-screening, management, testing and off-site disposal of soils.

National Public Works Project of the Year Award
 American Public Works Association (APWA), 2022

Structures Category - \$25M-\$75M Project Division

OWNER, CONTACT PERSON & PHONE NUMBER

Seattle Department of Transportation
 Chris Barnes
 206.234.1404

ARCHITECT OR ENGINEER & PHONE NUMBER

HNTB
 Kiva Lints
 425.633.7869

PROJECT LOCATION & COMPLETION DATE

Seattle, WA
 Project Completed 07/2021

AMOUNT OF CONTRACT AWARD

\$24,913,666

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

Final Contract: \$28,252,994
 Total Change Orders: \$3,339,328

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



"Orion has proven to be an exceptional construction partner on this project, from timely, top quality construction to proposing innovative solutions to complex technical problems. I do not hesitate to most strongly recommend Orion for any waterfront project throughout the Pacific Northwest, including any Navy base in this area. Well done to the Orion Team!"

-Vern Turner

Supervisory Civil Engineer, NAVFAC NW

P-993 Transit Protection System, USCG Station Ediz Hook

NAVFAC NW - Port Angeles, WA

Wharf & Residence Building Construction

Orion was a joint venture partner with Watts Constructors, LLC on the P-993 Transit Protection System, U.S. Coast Guard (USCG) Station Project. The project commenced in 2016 and involved the construction a pile supported concrete approach trestle and floating dock structure with associated appurtenances. The scope of work also involved the construction of a single-story residence building.

In support of the wharf and residence building, Orion and Watts installed two 7,000-gallon underground fiber reinforced plastic (FRP) temporary sanitary sewage storage tanks. In support of the installation, Orion installed a 51'x17' sheet cell with 30'-long sheets to a support a deep excavation of approximately -15'. Immediately following advancement of the sheet pile to grade, the interior of the coffer cell was excavated using a track excavator. As the excavation advanced, a dewatering collection sump was installed and used to dewater the excavation. Excavated material was subsequently staged on site, tested, and analyzed before being transported to an approved off-site disposal facility. Groundwater removed from the excavation was pre-screened for sheen and subsequently transferred to a grassy shoulder and allowed to passively infiltrate.

USCG Station Ediz Hook is an active station, which strictly prohibited any impact to maritime and/or aerial operation, and further required the joint venture to maintain vehicle access at all times. Orion and Watts successfully completed the project with no lost time incidents, no impacts to USCG operations, and in compliance with all the respective environmental project authorizations.

OWNER, CONTACT PERSON & PHONE NUMBER

NAVFAC NW
 Vern Turner
 360.620.7622

ARCHITECT OR ENGINEER & PHONE NUMBER

BergerABAM (currently WSP)
 Jake Linke
 253.820.1140

PROJECT LOCATION & COMPLETION DATE

Port Angeles, WA
 Project Completed 09/2018

AMOUNT OF CONTRACT AWARD

\$25,592,000

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

Final Contract: \$29,371,987
 Total Change Orders: \$3,779,987

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No

**LEED Silver Certified Project
 - New Construction & Major Renovations, April 2020**



Unalakleet River Revetment, Phase III

U.S. Army Corps of Engineers (USACE) - Alaska District - Unalakleet, AK

Sheet Pile Dock

This project included supply and construction of a new modified-diaphragm sheet pile bulkhead on the west bank of the Unalakleet River downstream from existing City Dock. Logistics were imperative, due to the location and construction season weather duration.

Orion used a Linkbelt 218 truck crane because of the mobility of the crane and confined construction area. The eight sheet pile cells were driven with an ICE 416L vibratory hammer, including the 22 fender pile for boat protection. Along with the assistance of a great community and an experienced crew, this project was completed just under three months, well ahead of the two-year initial construction schedule.

OWNER, CONTACT PERSON & PHONE NUMBER

USACE
 Ze Jong
 907.581.7319

ARCHITECT OR ENGINEER & PHONE NUMBER

This was a USACE designed project
 Robert Tedrick, Designer of Record
 907.753.5745

PROJECT LOCATION & COMPLETION DATE

Unalakleet, AK
 Project Completed 11/2017

AMOUNT OF CONTRACT AWARD

\$4,564,388

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

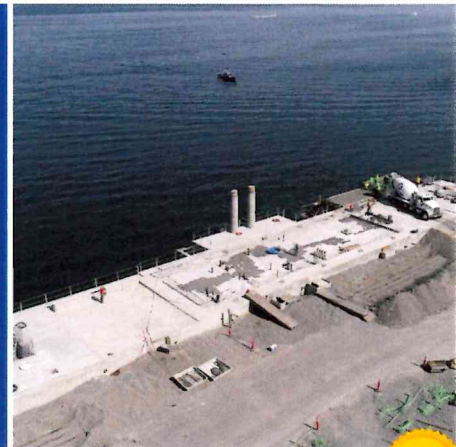
Final Contract: \$5,101,961
 Total Change Orders: \$537,573

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



Mukilteo Terminal Trestle & Bridge Seat Construction

Washington State DOT - Mukilteo, WA

Building Foundation & Bridge Installation

This project included improvement of SR 525, Mukilteo Ferry Terminal, MP 8.47 vicinity, a Federal Aid (FTA-funded) project, by constructing a trestle and bridge seat foundation, slope stabilization, selected demolition, pedestrian trail establishment, and utility work. Selective demolition and environmental cleanup was required due to the former USAF fuel storage and transfer area, known as the "Mukilteo Tank Farm."

The trestle structure will serve as the foundation for the future multi-story ferry terminal building. The foundation included 53 ea. 30" steel pile with lengths up to 120 LF. The trestle and bridge seat contained over 1,700 CY of concrete with over 530,000 pounds of reinforced steel.

WA Civic Design Award
 American Public Works
 AIA, 2021



OWNER, CONTACT PERSON & PHONE NUMBER

Washington State DOT
 Jeri Schurman
 425.356.9262

ARCHITECT OR ENGINEER & PHONE NUMBER

KPFF Consulting Engineers
 Dan Alire
 206.926.0509

PROJECT LOCATION & COMPLETION DATE

Mukilteo, WA
 Project Completed 10/2018

AMOUNT OF CONTRACT AWARD

\$4,648,054

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

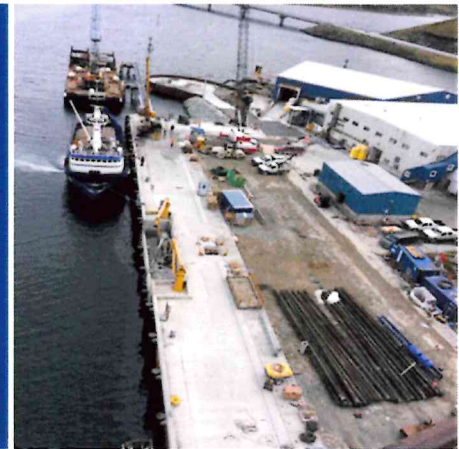
Final Contract: \$7,473,974
 Total Change Orders: \$2,825,920

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



UniSea G1 Dock Replacement

UniSea, Inc. - Dutch Harbor, AK

Demolition & Construction of a Sheet Pile Dock

This project included replacement of an existing pile-supported dock. Orion demolished the existing dock and hauled scrap steel and timber off the island for disposal. In nearly the same footprint, a new sheet pile dock was constructed. Part of the project included blasting in UniSea's quarry adjacent to many structures. Orion self-performed demolition, blasting, pile driving, earthwork, and the structural concrete.

This project included an accelerated schedule in order to minimize conflicts with seafood production operations. Contract requirements included intermediate milestone dates for demolition and partial completion dates. During construction changes were made by expanding the cod pump station, modifications to utilidor, and the transition bridge. Open lines of communication with the Engineer and Owner allowed these changes with minimal schedule impact. Orion was able to schedule 2017 dolphin construction work into 2016 operations, benefiting UniSea by one less season of construction.

OWNER, CONTACT PERSON & PHONE NUMBER

UniSea, Inc.
 Art Aliment
 907.581.7319

ARCHITECT OR ENGINEER & PHONE NUMBER

PN&D
 Dempsey Thieman
 907.561.1011

PROJECT LOCATION & COMPLETION DATE

Dutch Harbor, AK
 Project Completed 10/2016

AMOUNT OF CONTRACT AWARD

\$12,888,125

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

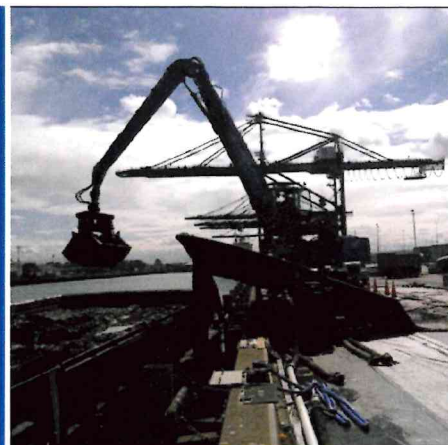
Final Contract: \$14,100,350
 Total Change Orders: \$1,212,225

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



Pier 4 Phase 1 Removal Action

Port of Tacoma - Tacoma, WA

Regulatory Agency Environmental Cleanup, Mechanical Dredging & Demolition

This project included dredging 71,131 CY of contaminated sediment, as well as 6,550 CY of clean sediment. Work also included substantial dock demolition, with removal of 1,175 concrete piles; 22 steel piles; and 78 timber piles.

The clean sediment dredging was completed using the DB Rainier equipped with a 7-CY Esco Digging Bucket loaded onto the Orion 2001 dump scow that was taken to the Commencement Bay Disposal Site for material disposal. The contaminated sediment was dredged with Orion's 4100 crawler crane on the Orion 1601 spud barge. A 3.5-CY Erie power arm bucket was used to dredge this mixture of thick sand, dense clay, and armor rock material. All contaminated (tributyltin) dredge sediment was loaded onto watertight barges (Orion 2001 dump scow with false bottom, Orion 2002 hopper barge, and Westar 204 flat deck barge) and towed to our transloaded site, where the material was loaded onto on-highway trucks by a material handler and taken to LRI Landfill. A spill apron and filter fabric/bermed truck loading areas were installed to prevent any contaminated material from spilling.

Water was not allowed to leave the barge while dredging. Free water had to be pumped into a settling pond, which was then pushed through an electrocoagulation water treatment system to remove the contaminants prior to discharge. The project was a success, with both the Port of Tacoma and EPA very happy with the results.

OWNER, CONTACT PERSON & PHONE NUMBER

Port of Tacoma
 Stan Ryter
 253.830.5315

ARCHITECT OR ENGINEER & PHONE NUMBER

KPFF Consulting Engineers
 Scott Kuebler
 253.508.9969

PROJECT LOCATION & COMPLETION DATE

Tacoma, WA
 Project Completed 03/2016

AMOUNT OF CONTRACT AWARD

\$10,536,500

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

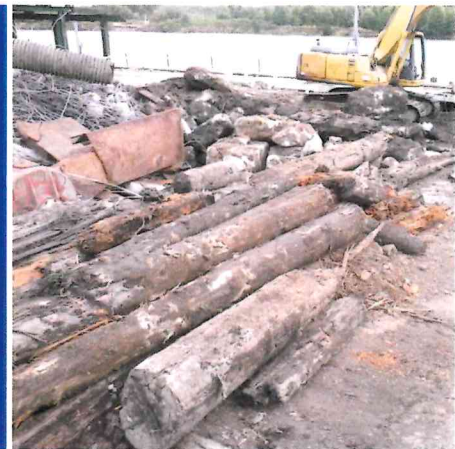
Final Contract: \$12,525,375
 Total Change Orders: \$1,988,875

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



Mary's River Lumber Mill & Montesano WWTP Bank Stabilization

City of Montesano (sub to Stellar J Corp.) -
 Montesano, WA

Shoreline Bulkhead Construction

Work included installation of 1,400'-long sheetpile and H-pile combination wall in the on the intertidal zone of the Chehalis River for bank stabilization and to protect the riverfront property from the annual spring flood erosion and future 100-year storms. Due to the alignment of the natural flowing river many stationed turns had to be met with tight tolerances. In order to accomplish this, a two sided template was used in conjunction with temporary H-pile driven and fixed. The entire project was completed using an APE 200 vibratory pile hammer. The permanent materials used were Skyline Steel HZ1080MA (60'-0")/AZ14-770(45'-0") Combination Section.

OWNER, CONTACT PERSON & PHONE NUMBER

Stellar J Corp
 Tim Bauman
 360.518.5099

ARCHITECT OR ENGINEER & PHONE NUMBER

Parametrix
 Steve Schmitz
 253.604.6600

PROJECT LOCATION & COMPLETION DATE

Montesano, WA
 Project Completed 12/2014

AMOUNT OF CONTRACT AWARD

\$340,750

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

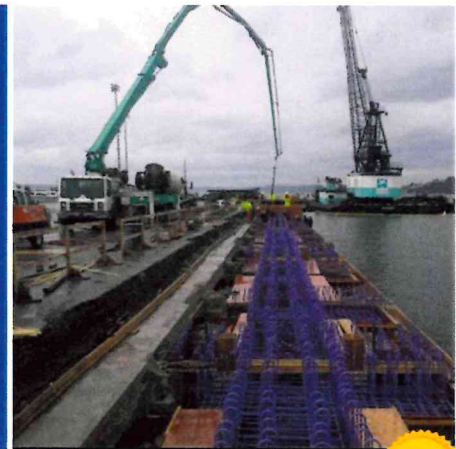
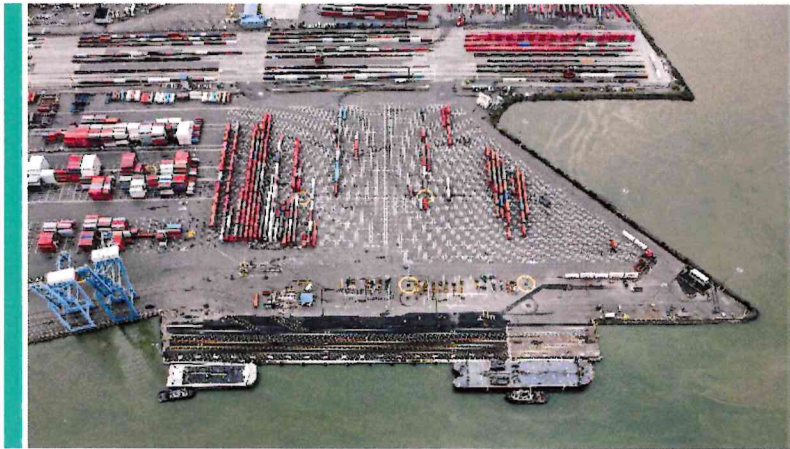
Final Contract: \$429,953
 Total Change Orders: \$89,203

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



Pier 3 Upgrade

Port of Tacoma - Tacoma, WA

Demolition & Marine Construction

This project redeveloped and strengthened Pier 3 to accommodate wider and greater draft container vessels calling to the Port of Tacoma. Orion's scope of work included the demolition of approximately 13,500 SF of overwater cast-in-place (CIP) and pre-cast decking; CIP crane rail beams; CIP bent caps; removal of timber fender system; and strategic demolition of select elements of the land side crane rail and bulkhead.

Reconstruction of the waterside portion of Pier 3 required the installation of 100 additional pre-cast pre-stressed concrete piles, replacement of the waterside crane beam and rail, upgrade of the fender systems to a rubber/HDPE panel cantilevered system, and redesign of the bollard system.

Landside improvements included the installation of 36 concrete piles under the landside crane beam and 100' gauge crane rail. To meet the electrical demands of the future 100' gauge gantry cranes, a new 13.8 kV electrical substation was also constructed.

**National Public Works
 Project of the Year Award**

*American Public Works
 Association (APWA), 2015*
 Structures Category - \$5M-\$25M
 Project Division

OWNER, CONTACT PERSON & PHONE NUMBER

Port of Tacoma
 Stan Ryter
 253.830.5315

ARCHITECT OR ENGINEER & PHONE NUMBER

BergerABAM (currently WSP)
 Daryl English
 206.602.5319

PROJECT LOCATION & COMPLETION DATE

Tacoma, WA
 Project Completed 11/2014

AMOUNT OF CONTRACT AWARD

\$14,998,160

FINAL CONTRACT AMOUNT & TOTAL AMOUNT OF CHANGE ORDERS

Final Contract: \$15,452,139
 Total Change Orders: \$453,979

TOTAL PROJECT CLAIMS

There were no litigation/arbitration claims associated with this project.

CM/GC PROJECT?

No



Section 2

Safety

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Orion’s Approach to Safety

Orion’s safety program focuses on providing the tools, training, and planning expertise needed to achieve a ‘Target Zero’ goal that is set for all projects. ‘Target Zero’ goal achievement encompasses addressing all aspects of incident management on the project to ensure the safety of employees, subcontractors, and third parties, as shown in Figure 2.1. ‘Target Zero’ safety planning also involves eliminating equipment damage and third-party damage; incorporating daily Job Hazard Analysis reviews; and training goals, from handheld tool training, to ‘Near Miss’ reporting.

‘Target Zero’ safety planning on the Pier 2 West Rehab project will begin in the Preconstruction Phase at the Preconstruction Conference. Project Manager Bradley Morlock, in consultation with Safety Manager Doug Rosenthal, will develop a draft list of potential safety concerns that will be reviewed with the CM/GC team, and collaboratively eliminated or mitigated through the iterative design reviews. At design completion, the final safety assessment will be included with the GMP Supporting Documents and incorporated into the Project Specific Safety Plan (PSSP).

During the Construction Phase, Orion will complete and implement the Project Specific Safety Plan. Planning, communication, and documentation of the PSSP are accomplished with a variety of tools. A Job Hazard Analysis is completed for each work activity and reviewed

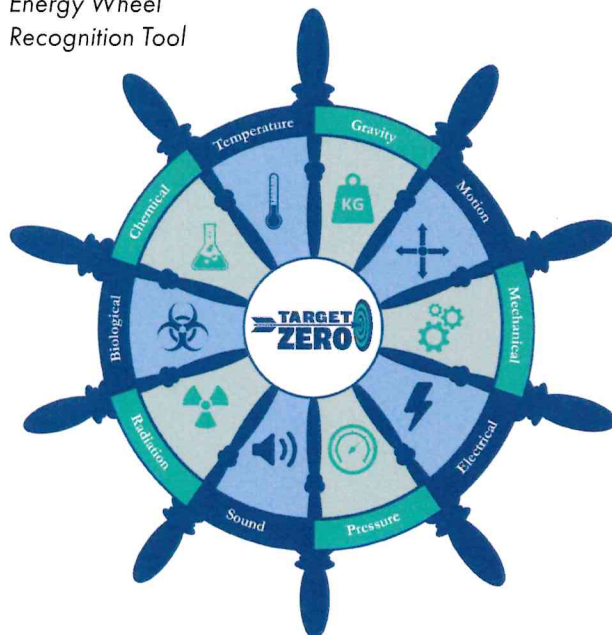


Figure 2.1 -
 Orion
 Target Zero Process

with all members involved and checked by supervisors in random observations. ‘Target Zero’ reports are weekly trainings that review new safety techniques and share lessons learned, and are documented with of Orion’s tablet-based safety management system. Lastly, Orion trains employees to utilize the Energy Wheel during JHA development as a tool to identify hazards that may not be easily recognizable. The 10 energy types shown in Figure 2.2 serve as a checklist that allows for detailed hazard identification and energy potential review, while achieving higher hazard awareness.

As part of our commitment to ‘Target Zero’, Orion is a leader in the industry regarding safety through our active participation in various organizations such as the Council for Dredging & Marine Construction Safety and the Construction Safety Research Alliance. Orion was recently recognized as a Sapphire Level sponsor for the Board of Certified Safety Professionals. People are our most important asset, and the company’s commitment to safety is reflected in our actions and values.

Figure 2.2 -
 Energy Wheel
 Recognition Tool



Experience Modification Ratings (EMRs) from 2019, 2020 & 2021

- 2019: 0.46
- 2020: 0.57
- 2021: 0.82

Section 3

Staffing & Staff Qualifications

DESIGN.
BUILD. DELIVER.

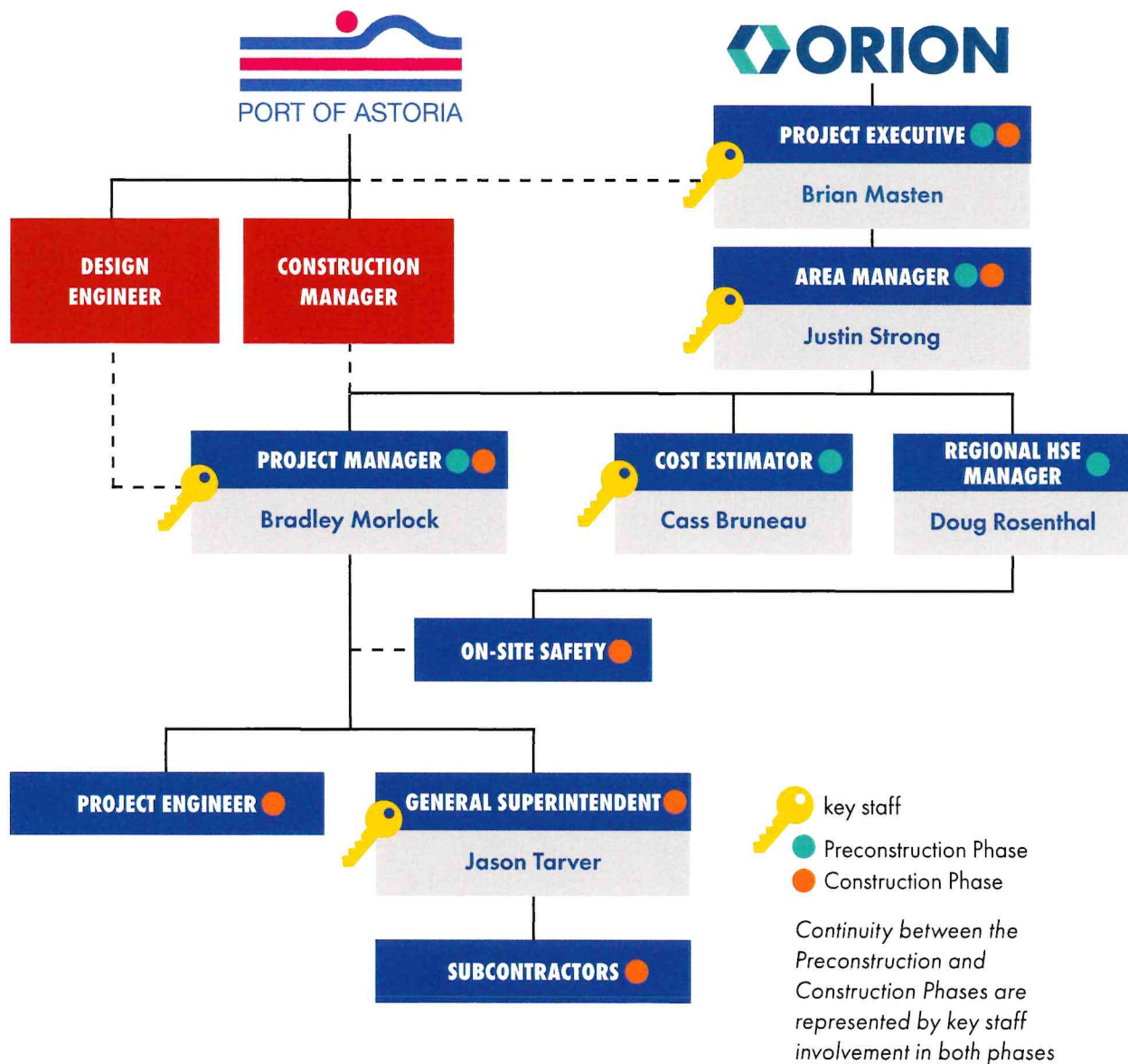
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Organizational Structure

Orion proposes a lean organization tailored to the needs and schedule required to successfully complete this Project. In assembling this team, our Project Executive, Brian Masten, and the Orion Pacific Northwest regional leadership group identified key personnel who are available and uniquely experienced in this scope of work. Project Manager Bradley Morlock brings 36 years of similar experience in the Pacific Northwest. Orion has laid the groundwork for success by taking great care to define the right people and the right level of personnel commitment to balance the budget and proposed schedule. Our team is committed to this project from Notice to Proceed (NTP) to final project completion.

ORGANIZATIONAL CHART



Project Team

Below we summarize the roles and experience of our Project Team. Each team member is available and committed to this project and will be available immediately from NTP through final closeout of the project. On the following pages, we provide resumes for key staff.



KEY STAFF



Brian Masten, Project Executive

Brian is a proven leader with significant experience on complex and publicly recognizable bridges, dams, marine terminals, docks, and industrial projects. With a sharp focus on Project Owner satisfaction, he prides himself on delivering projects on time and within budget.



Justin Strong, Area Manager

Justin has 15 years of experience in all phases of heavy civil and marine construction projects including dredging/remediation, bridges, docks, and demolition. He recently oversaw the Terminal 5 Berth Modernization Project for the Port of Seattle.



Bradley Morlock, Project Manager

An industry veteran, Bradley brings 36 years of experience overseeing large, complex marine construction projects. He takes an active approach to managing subcontractors and large, multi-disciplined crews to ensure successful project delivery.



Jason Tarver, General Superintendent

Jason's 25 years of experience covers a variety of complex infrastructure and environmental projects. His most recent projects focus on managing large multi-discipline crews for demolition and retrofit upgrades, environmental dredging, and new pier construction.



Cass Bruneau, Cost Estimator

Cass brings diverse heavy civil and marine construction experience. He has successfully estimated and completed Department of Transportation contracts in multiple western states.



Brian Masten,
 Project Executive

18

Years of Relevant Experience

9

Years with Orion

100%

Availability
 During Each Phase of the Project

EDUCATION & CERTIFICATIONS

- BS, Construction Management, Central Washington University
- BS, Business Administration, Central Washington University

WORK HISTORY

Orion

- 2019-Present: VP of Operations
- 2018-2019: Director of Operations
- 2013-2018: Project Manager

General Construction

- 2004-2013: General Superintendent

QUALIFICATIONS SUMMARY

Brian Masten is an experienced heavy civil construction manager with a background in complex and publicly recognizable bridges, dams, marine terminals, docks, and industrial projects. Over his career, he has achieved increasing levels of responsibility and project oversight on numerous local projects successfully completed safely, on time, within budget, and to the Owner's satisfaction. As Vice President, he is responsible for all West Coast operations including oversight of project proposals, estimating, training, contract administration, safety, quality, and production.

RELEVANT EXPERIENCE

Terminal 5 Berth Modernization Project, Seattle, WA

Project Executive. Terminal modernization scope includes waterside and landside crane rail reconstruction; rehabilitation of existing distressed dock structural elements; fender system replacement; underwater retaining wall construction; berth deepening; ground improvement; supply of electrical power and communication for new cranes and reefers; and replacement of existing dock utilities.

\$160M | Port of Seattle | 2019 - Current

Fairview Avenue North Bridge Structure Replacement, Seattle, WA

Project Executive. Project included demolition of timber structures, one 500' timber-founded bridge, and one 500' concrete-founded bridge along south Lake Union.

\$25M | Seattle Department of Transportation (SDOT) | 2019 - 2021

P-993 Transit Protection System, USCG Station Ediz Hook, Port Angeles, WA

Area Manager. This project was undertaken for NAVFAC NW through a joint venture with Watts (Watts/Orion JV). Orion constructed a 16,000-SF concrete pier founded on 107 ea. pipe pile ranging from 18" to 36" diameter. Orion also constructed and installed three precast concrete floats totaling 4,200 SF of floating dock surface.

\$25.6M | NAVFAC Northwest | 2018

Pier 3 Upgrade, Tacoma, WA

Project Manager. This project consisted of an upgrade to an existing container crane wharf facility. Brian oversaw the project startup, cost management, contract compliance, and overall day-to-day operations. The project was completed successfully to the satisfaction of the owner with zero injuries.

\$15.5M | Port of Tacoma | 2014



Justin Strong
 Area Manager

15

Years of Relevant Experience

9

Years with Orion

100%

Availability

During Each Phase of the Project

EDUCATION & CERTIFICATIONS

- BS, Construction Management, Central Washington University
- OSHA 30-hour
- 40-hour HAZWOPER
- Confined Space Competent Person
- Trenching & Shoring Competent Person
- MSHA New Miner
- First Aid/CPR

WORK HISTORY

Orion

- 2021-Present: Area Manager
- 2018-2021: Sr. Project Manager
- 2017-2018: Project Manager
- 2013-2017: Asst. Project Manager

General Construction

- 2007-2013: Project Engineer

QUALIFICATIONS SUMMARY

Justin Strong has 15 years of construction experience on all phases of heavy civil and marine construction projects including dredging/remediation, bridges, docks, and demolition. Most recently, he was responsible for overseeing the Terminal 5 Berth Modernization Project for the Port of Seattle.

RELEVANT EXPERIENCE

Terminal 5 Berth Modernization, Seattle, WA

Senior Project Manager. This project consisted of the rehabilitation and strengthening of the existing marginal wharf at Terminal 5, including berth deepening and electrical upgrades. A portion of the existing wharf, select piling, and the existing feeder system were demolished; new pinch pile and sheet toe wall were installed for stabilization; new waterside concrete piling and steel landslide piling were installed to support the new crane rails; new concrete marginal wharf with fender system was installed; and a new electrical substation was installed with power and data distributed behind the wharf to secondary service substations.

\$160M | Port of Seattle | 2019 - Current

P-993 Transit Protection System, USCG Station Ediz Hook, Port Angeles, WA

Senior Project Manager. Orion, in a joint venture partner with Watts Constructors, LLC provided construction of a pile supported concrete approach trestle and floating dock structure with associated appurtenances. The scope of work also involved the construction of a single-story residence building.

\$25.6M | NAVFAC Northwest | 2018

UniSea Dock Open Cell Dock & Fish Waste Disposal, Dutch Harbor, AK

Dredge Operation Sponsor. This project included the removal of 240 LF of pile-supported dock and installation of 450 LF of open cell sheetpile dock with concrete slab overlay and two dolphins with catwalks. Work includes 39 rock socket pile and eight rock anchor pile. The team dredged 13,000 CY of seafood waste disposal with crane/barge and disposed of offshore.

\$17.2M | UniSea, Inc. (Dutch Harbor) | 2016

Maintenance Dredging, Olympia, WA

Project Superintendent. Oversaw all aspects of construction including dredging approximately 30,000 CY of sediment for upland disposal and the placement of a 6-inch sand cap over 14,400 SF of the area. The Port of Olympia is an active port and the team consistently had to work around ship schedules to dig in any open areas.

\$3.5M | Port of Olympia | 2013 - 2014

Chambers Creek & Steilacom Piling & Dock Removal, University Place, WA

Project Superintendent. This project consisted of the removal and disposal of approximately 850 creosote piling, 70 steel piling filled with concrete, and 40 concrete piling. Demolition of three large overwater concrete caps at 30 TN; 125 TN; and 225 TN as well as 15,200 SF of timber deck structure.

\$1M | WSDNR | 2014



Bradley Morlock
 Project Manager

36

Years of Relevant Experience

9

Years with Orion

100%

Availability
 During Each Phase of the Project

EDUCATION & CERTIFICATIONS

- Los Angeles Pile Drivers Apprenticeship Program
- Rio Hondo College Pile Drivers Training Center Graduate
- Kiewit University: Supervisory, Form Work, Survey, Superintendent Schools
- CESCL Certification
- Confined Space Entry
- OSHA 30

WORK HISTORY

Orion

- 2018-Present: Sr. Project Manager
- 2016-2018: Project Manager
- 2013-2016: Superintendent

QUALIFICATIONS SUMMARY

Bradley Morlock’s 36-year career overseeing all phases of marine construction projects spans a diverse array of complex, multi-million-dollar infrastructure and environmental construction projects for private sector and government agency clients. His experience includes managing subcontractors and large multi-discipline crews on a variety of pier, wharf, outfall, highway/bridge, and other marine construction maintenance, improvement, and demolition projects.

RELEVANT EXPERIENCE

Bradley is responsible for estimating and managing marine, pier, wharf, and dock projects in the Puget Sound and West Coast Regions. Many of these projects include pier demolition, pile removal and disposal, pile procurement and installation, installation of large precast and prefabricated elements, and the installation of cast-in-place (CIP) concrete pile caps, decks, and bull rails.

On any of these projects, Bradley may be managing multiple subcontractors performing electrical, mechanical, and fire system installations. Also under his current role, Bradley manages the operations and maintenance for the City of Tacoma’s two draw bridges under a 5-year contract.

Terminal 5 Berth Modernization, Seattle, WA

Senior Project Manager. This project consisted of the rehabilitation and strengthening of the existing marginal wharf at Terminal 5, including berth deepening and electrical upgrades. A portion of the existing wharf, select piling, and the existing feeder system were demolished; new pinch pile and sheet toe wall were installed for stabilization; new waterside concrete piling and steel landslide piling were installed to support the new crane rails; new concrete marginal wharf with fender system was installed; and a new electrical substation was installed with power and data distributed behind the wharf to secondary service substations. Bradley is in charge of berth rehabilitation for the Port of Seattle.

\$160M | Port of Seattle | 2019 - Current

Swantown & Marine Terminal Maintenance Dredging, Olympia, WA

Senior Project Manager. This project removed 23,618 CY of contaminated sediment from the Marine Terminal and Swantown Boatworks. The Port of Olympia issued a change order to deconstruct two older container gantry cranes that had become obsolete. Working closely with key subconsultants, one Paceco and one Star gantry crane were successfully dismantled and scrapped. Bradley helped ensure the project worked around the Port’s active shipping schedule and did not delay ships coming or going from the Port.

\$3.8M | Port of Olympia | 2013-2014

Certainteed Gypsum Barge Unloading Facility, Seattle, WA

Senior Project Manager. This project included a main dock structure and two heavy steel mooring dolphins in the Duwamish Waterway. Bradley was in charge of the demolition and reconstruction of the heavy gypsum barge facility.

\$2.9M | Certainteed Gypsum Manufacturing, Inc. | 2017-2018



Jason Tarver
 General Superintendent

25

Years of Relevant Experience

9

Years with Orion

100%

Availability
 During Each Phase of the Project

CERTIFICATIONS

- Local 2396 Pile Drivers Apprenticeship Program (Kent, WA)
- Confined Space Entry
- First Aid/CPR
- WABO Certified Welder

WORK HISTORY

Orion

- 2013-Present: Superintendent

General Construction

- 2004-2013: Key Foreman
- 1997-2003: Pile Driving Journeyman

Traylor Bros.

- 2003-2004: Pile Driving Journeyman

QUALIFICATIONS SUMMARY

Jason Tarver has spent 25 years learning all aspects of marine construction field operations. As his level of experience has grown, his roles have included increasing responsibility in the planning, coordination, and oversight of the marine construction process. Jason’s projects include a variety of complex infrastructure and environmental work for private sector and government agency clients. Most recently, Jason’s projects have focused on demolition and retrofit upgrades to existing facilities, environmental dredging, and new pier construction. He effectively managed large multi-discipline crews, subcontractors, and equipment operations movements on a number of highway/bridge, wharf, pier, and other marine maintenance, improvement, and demolition projects.

RELEVANT EXPERIENCE

Fairview Avenue North Bridge Structure Replacement, Seattle, WA
Project Superintendent. Responsible for the demolition of timber structures, one 500’ timber-founded bridge, and one 500’ concrete-founded bridge along South Lake Union; the fabrication/installation/removal of a 500’ temporary work trestle; installation of 15 8’-diameter shafts ranging from 80’ to 140’ in depth; and the installation and removal of steel falsework to support 1 million pounds of concrete girders and bridge deck.

\$25M | Seattle Department of Transportation (SDOT) | Year - 2021

Puget Sound Energy LNG Dock, Tacoma, WA

Project Superintendent. Project included demolition of remedial creosote sites within the Port of Tacoma and construction of a new loading platform deck pier for fueling cargo ships with liquefied natural gas (LNG). Field operations included containment and demolition of existing timber structures within the Port followed by installation of 24”, 30”, and 36” coated steel piling that required field splices due to deep embedment. The project also required construction of a cast-in-place (CIP) loading pier for LNG, construction of steel breasting dolphin for cargo ships, and upland abutments for longshoreman access.

\$3.1M | Puget Sound Energy | 2017

Custom Plywood Phase II Remedial Action, Anacortes, WA

Project Superintendent. Jason performed site survey and turbidity management operations and managed field operations to remove pile sand demolish dilapidated dock structure components. He coordinated on-site barge movements and barge transport of dredging spoils, debris, and upland excavation spoils to and from the project site. Project included removal of 1,500 creosote piling; dredging 31,500 CY of environmentally sensitive sediment; and excavating 16,200 CY of material from an intertidal zone. Dredge and excavation spoils were transported by barge to Seattle for offloading and transport to a permitted upland disposal facility. Following demolition activities, 134,500 tons of backfill material was placed to backfill where environmental dredging and excavation had occurred, construct a new spit, and extend the existing jetty.

\$8.2M | Department of Ecology | 2013



Cass Bruneau
 Cost Estimator

29

Years of Relevant Experience

12

Years with Orion

100%

Availability
 During Each Phase of the Project

EDUCATION AND
 CERTIFICATIONS

- BS, Construction Management, Washington State University
- BA, Business Administration, Washington State University

WORK HISTORY

Orion

- 2012-Present: Chief Estimator
- 2010-2012: Project Manager

Kiewit Companies

- 2007-2010: Asst. Project Manager
- 2000-2007: Sr. Project Manager
- 1998-2000: Field, Project Manager

QUALIFICATIONS SUMMARY

Cass Bruneau is an experienced manager who brings 29 years of extensive and diverse heavy civil and marine construction experience, including a design-build (D-B) project background with a strong history of successfully estimating and completing large, challenging contracts in multiple western states.

RELEVANT EXPERIENCE

Fairview Avenue North Bridge Structure Replacement, Seattle, WA
Cost Estimator. Project included demolition of timber structures, one 500' timber-founded bridge, and one 500' concrete-founded bridge along south Lake Union.

\$25M | Seattle Department of Transportation (SDOT) | 2019 - 2021

P-993 Transit Protection System, USCG Station Ediz Hook, Port Angeles, WA

Cost Estimator. Orion, in a joint venture partner with Watts Constructors, LLC provided construction of a pile supported concrete approach trestle and floating dock structure with associated appurtenances. The scope of work also involved the construction of a single-story residence building.

\$25.6M | NAVFAC Northwest | 2018

Pier 3 Upgrade, Tacoma, WA

Cost Estimator. This project consisted of an upgrade to an existing container crane wharf facility. Work included demolition of approximately 13,500 SF of overwater cast-in-place (CIP) and pre-cast decking; CIP crane rail beams; CIP bent caps; removal of timber fender system; and strategic demolition of select elements of the land side crane rail and bulkhead. The project was completed successfully to the satisfaction of the owner with zero injuries.

\$15.5M | Port of Tacoma | 2014

Pier 4 Phase 1 Removal Action, Tacoma, WA

Cost Estimator. This project included dredging 71,131 CY of contaminated sediment, as well as 6,550 CY of clean sediment. Work also included substantial dock demolition, with removal of 1,175 concrete piles; 22 steel piles; and 78 timber piles.

\$12.5M | Port of Tacoma | 2016

Hyder Causeway Reconstruction & Trestle Replacement, Hyder, AK

Project Manager/Cost Estimator. Cass was responsible for the construction of a new 770' (9-span) two-lane, pile founded concrete bridge trestle. The bridge included driven steel piles, precast concrete pile caps, and precast roadway girders. Other project elements included subcontracted grading, embankment, slope protection, and striping.

\$8.7M | Alaska Department of Transportation | 2013

Section 4

Project Approach

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Project Approach

Orion fully understands our role on the CM/GC team and is prepared to participate wholly in order to achieve the Port of Astoria’s goals of maximizing value, minimizing inconvenience, and reducing risk. Our approach to the CM/GC process includes multiple review steps to clearly define the scope and risks of the project; to provide documented communication with clarifications and assumptions for full transparency; and to include schedule, material, and scope options for the Port’s review. The preconstruction effort will be led by Bradley Morlock as the CM/GC Representative, and to ensure a seamless transition from Preconstruction into the Construction Phase, Bradley will stay on the project during execution as Project Manager. Bradley brings 36 years of experience working in the construction industry and will be a valuable team member in defining the scope, developing subcontractor and supplier lists, and reviewing logistics.

Table 1 on Page 21 summarizes the list of deliverables Orion will provide during the Preconstruction and Construction Phases. The deliverables are organized by the steps in the RFP for review, starting with an initial evaluation of current contract documents at the preconstruction conference, followed by reviews at the Design Engineer Selection Phase, all interim phases of design, and ending with a complete Guaranteed Maximum Price (GMP) Amendment with supporting documents at 100% design completion. This utilizes each step of the review process to refine assumptions and clarifications, develop a detailed scope, provide cost certainty for grant applications, mitigate risk, and ultimately limit the construction contingency for the Port.

During the initial evaluation, Bradley will coordinate our full team including Senior Estimator Cass Bruneau; Area Manager Justin Strong; Regional Safety Manager Doug Rosenthal; and Project Executive Brian Masten for early identification of project cost, schedule, and safety advantages. The entire team brings recent experience with similar types of work including sheetpile installation, dredging, structure backfill, and dock electrical and mechanical installation. The team’s experience will provide great value to the Port in developing the initial list of assumptions and clarifications, as well as an initial list of long lead items that will be provided to the CM/GC team to refine the contract documents through to the GMP Amendment completion.



■ Timber Structure Removal - Vigor Shipyards
 Currently under contract



■ Pier 58 Emergency Demolition & Removal
 Completed 2021



■ Point Hudson Breakwater Installation -
 Port of Port Townsend
 Currently under contract



■ Vigor Shipyard - Dredging | Currently under contract

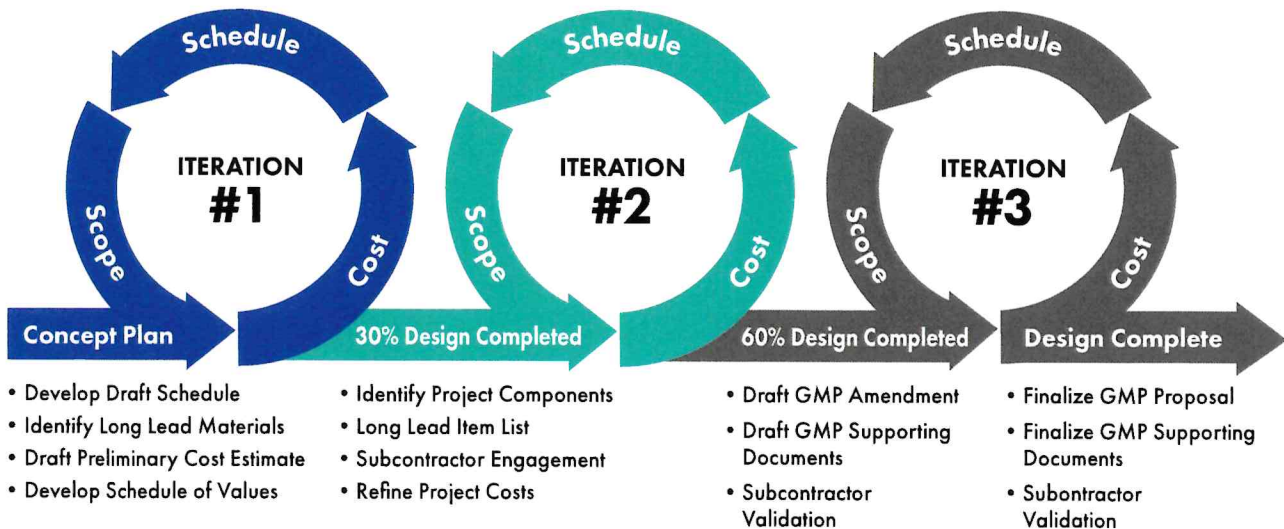
Our approach to the CM/GC process is to delve further into the details of the project at each step to refine clarifications and assumptions, develop a draft project schedule, develop a draft GMP, and engage the subcontracting and supplier community. A major part of refining the clarifications and assumptions will be the completion of an initial Construction Feasibility Study, led by Project Manager Bradley Morlock. This study will include an analysis of phasing, labor availability, material availability, and weather impacts. The result of this upfront planning and identification of opportunities in the overall approach will result in a Construction Plan that minimizes cost and risk and maximizes cost and schedule certainty. Cass Bruneau will utilize the results of the Feasibility Study to lead the development of the draft GMP Proposal, as well as develop the subcontractor and supplier list.

Cass will also lead the development of the draft project schedule, including the draft Procurement Plan. Iterative design reviews performed by the Orion team through each interim step of the design development, as shown in Figure 4.1, will result in a continuously revised GMP supporting document list including drafts of clarifications and assumptions, project schedule (including procurement schedule), cost estimates, contingency plan, and subcontracting plan.

Orion's Goals in the CM/GC Process:

1. Instill transparency in all processes
2. Communicate openly & often
3. Maintain flexibility in scheduling
4. Require a solution-oriented approach

Figure 4.1 - Iterative Design Development

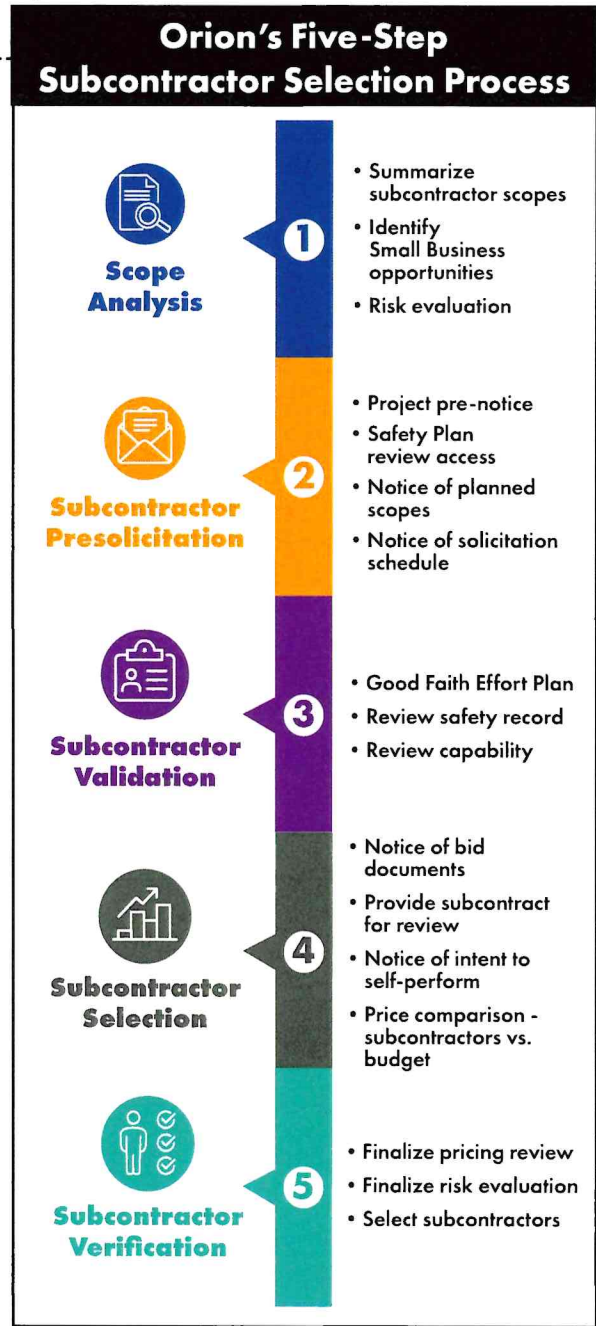


At the final step of the preconstruction process, the Orion team will utilize the previously developed work scope and complete the assumptions and clarifications list in order to reduce risk and ensure cost certainty. As design will be 100% complete in this stage, Bradley will leverage the previously provided deliverables to finalize the GMP Amendment, including GMP supporting documents for the project schedule, schedule of values, subcontracting plan, and other applicable reports. The GMP Amendment with supporting documents will become the Project Management Plan that Orion will follow in the Construction Phase for subcontractor solicitation, material procurement, safety management, quality management, and execution.

After successful completion of the Preconstruction Phase and negotiation of the GMP Amendment for the project, Bradley will seamlessly transition the team into the Construction Phase and utilize the Project Management Plan to initiate early material procurement and finalize subcontractor selection through a competitive bidding process. The Procurement Plan includes a five-step subcontractor selection process, as shown in Figure 4.2. The first three steps of the subcontractor selection process occur during the Preconstruction Phase, as listed in the Deliverable Checklist (Table 1) on the following page. These early phases are utilized to develop early interest in the project by engaging subcontractors and suppliers during Preconstruction, and allows the team to further refine the list of long lead items to develop a procurement schedule as well as the list of possible suppliers and subcontractors. The last two steps of the subcontractor selection process occur during the Construction Phase, during final subcontractor solicitation and when quotes are reviewed, compared to budget, and verified for award.

To meet the targeted Construction Phase start date of August 12, 2024, material procurement for long lead items such as sheet pile will need to commence early in the Construction Phase. This is accomplished with an Early Work GMP Amendment for material procurement starting at the end of design in January 2024 with a planned delivery before the in-water work window starts in November 2024. An Early Work GMP Amendment will be required to maintain the scheduled start date, due to the current production volatility and long lead fabrication time for steel products.

Figure 4.2 - Subcontractor Selection Plan



Results in positive partnerships with our subcontractors.

Estimates will be produced soliciting subcontract quotes for all scopes of work and communicated in transparent and detailed estimate reviews.

Table 1 - CM/GC Deliverables & Quality Checklist

	Preconstruction Phase					Construction Phase	Deliverable
	Precon Conf	Eng Selection Phase	30% Design	60% Design	100% Design		
Initial Evaluation							
Evaluation of Contract Documents	●						Draft Memo of Clarifications & Assumptions
Role & Scope Discussion	●						Draft Memo of Clarifications & Assumptions
Project Decision-Making Processes/Procedures	●						Draft Memo of Clarifications & Assumptions
Preliminary Design & Construction Schedule	●						Draft Memo of Clarifications & Assumptions
Preliminary Cost & Schedule Review	●						Draft Memo of Clarifications & Assumptions
Schedule of Preconstruction Values	●						Draft Memo of Clarifications & Assumptions
Initial list of Long-Lead Items	●						Draft List of Long-Lead Items
Consultation							
Input on Design Engineer Selection Criteria		●					Selection Criteria Memo
Participate in Engineer Selection Process		●					Scoring Checklist Review
Final Pier Design Selection after Engineer Procurement		●					Option Analysis Report
Provide Recommendations for:							
Review Program & Budget		●					Draft List of Clarifications & Assumptions
Construction Feasibility		●					Draft List of Clarifications & Assumptions
Value Engineering Analysis		●					Draft List of Clarifications & Assumptions
Cost Estimating Process Review		●					Draft List of Clarifications & Assumptions
Bidding Market Condition Review		●					Draft List of Clarifications & Assumptions
Iterative Design Review							
Review Project Scope & Quantities			●	●	●		Draft List of Clarifications & Assumptions
Review Project Material Cost Estimates			●	●	●		Draft List of Clarifications & Assumptions
Review Project Schedule			●	●	●		Draft List of Clarifications & Assumptions
Review Project Safety & Quality Requirements			●	●	●		Draft List of Clarifications & Assumptions
Develop Construction Contingency			●	●	●		Draft List of Clarifications & Assumptions
Subcontractor Selection							
Evaluate Subcontract SOW (Part 1 of SSP)			●				Draft Subcontracting Plan
Subcontractor Presolicitation (Part 2 of SSP)			●				Draft Subcontracting Plan
Subcontractor Validation (Part 3 of SSP)				●			Draft Subcontracting Plan
Project Schedule Development							
Identify Project Components		●	●				Draft Project Schedule
Develop Construction Progress Schedule			●	●			Draft Project Schedule
Recommend a Schedule for Procurement of Long Lead Items (Early Work)			●				Draft Project Schedule
Finalize GMP Amendment							
List of Documents used in Basis of GMP					●		GMP Supporting Document
List of Allowances/Clarifications/Assumptions					●		GMP Supporting Document
Subcontractor Plan - Final					●		GMP Supporting Document
Final Project Schedule					●		GMP Supporting Document
Schedule of Values					●		GMP Supporting Document
GMP (Section 6.2)					●		GMP Proposal
Construction Phase Commencement					●		GMP Amendment
Early Work							
Solicit Material Quotes & Selection						●	Material Quote Analysis
Execute Material Purchase Orders						●	Material On-Hand Payment Request
Construction Management							
Subcontractor Quotes/Selection (Part 4 of SSP)						●	Subcontracting Plan
Verify Subcontractor Selection (Part 5 of SSP)						●	Subcontracting Plan
Construction Progress Schedule						●	Update per Section 6.2
Develop System of Control for Cost of Work						●	Update per Section 5.2.2
Contingency Tracking Summary						●	Update Risk Register per 7.4.5

Unique & Creative Strategies

After reviewing the contract documents and developing the draft pricing and project schedule for this proposal, Orion has identified opportunities to maximize quality, reduce schedule, and provide cost certainty for grant application use. The first opportunity is to optimize the wall design with the selected design engineer. Options to review in-wall design include the use of pipe pile in lieu of I-beam, and to design the wall with a simplified tie-back system.

Several schedule opportunities need to be maximized to reduce the overall project schedule. First would be a review of the project schedule and warehouse logistics to consider a change in the phasing from three stages to two stages. This would eliminate a full construction season with substantial cost savings. The second schedule opportunity involves early material procurement as noted in the Approach section.

The advantages Orion provides for this schedule opportunity are described below.



■ Terminal 5 Berth Modernization, Pier Strengthening & Berth Deepening - Port of Seattle
 Currently under contract

THE ORION TEAM - The Right Team for the Project Approach

Orion Marine Group is a leading heavy civil and marine contractor providing a broad range of turnkey marine, civil, and specialty construction services on, over, and under the water, as well as onshore for major industrial and commercial applications along the Gulf Coast, Atlantic Seaboard, and the Caribbean Basin. For over 80 years Orion has offered marine transportation facility construction, dredging, bridge building, marine pipeline installation, industrial concrete and foundations, environmental remediation and habitat restoration, as well as specialty operations including pile driving, drilled shafts, marine towing, demolition, excavation, and salvage and diving services including underwater inspection and repair.

Orion's nationwide experience in self-performing work similar to the Pier 2 West Rehab provides the Port of Astoria with several advantageous opportunities for this project. First, our nationwide purchasing power with steel suppliers provides the Port the best price and can be procured at a lower cost and price risk with an Early Work GMP Amendment at 60% Design.

Secondly, Orion's ability to self-perform the in-water sheetpile work on the critical path provides the Port cost and schedule certainty over managing subcontractors.



■ Point Hudson Breakwater, Port Townsend
 Currently under contract

Secure pricing for this work will be completed earlier in the design process, providing the following benefits:

- Early self-perform pricing eliminates possible subcontractor Failure of Proposal Process concerns during subcontractor solicitation at design completion
- Eliminates contingency needs for trade work failure
- Provides cost certainty for grant application budget requests earlier in the CM/GC process

Section 5

Project Costs & Timeline

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Project Costs & Timeline

CM/GC Fees

Orion's fees, itemized as outlined in *Schedule RS.1 - Project Cost Matrix*, are provided in the separately enclosed sealed envelope.

Cost of Work

Direct costs for the construction of the rehabilitated pier are included in *Schedule RS.1A (Project Cost Matrix: Cost of Work)*, which is provided in the separately enclosed sealed envelope.

Project Schedule

The project schedule is based on the 30% drawings included in *Exhibit RE.3*, additional details in *Exhibits RE.6 and RE.7*, and target dates provided in the updated *Schedule RS.2-Preconstruction Phase Tentative Schedule* issued by the Port. The flow of the CM/GC process includes preconstruction activities to complete the selection of the Design Engineer, finalize design, and allow time for the permit application and review period. The Construction Phase includes early work for material procurement and upon acceptance the three construction phases to replace the existing timber dock structure with the sheetpile bulkhead.

Orion has assumed no supply chain issues but has acknowledged that the current market for steel products is volatile in terms of cost and fabrication schedule. To reduce risk to the Pier 2 Rehab project schedule, early work procurement activities for steel products have been included to ensure the targeted construction start date of August 12, 2024 can be achieved to maximize the use of that winter's in-water work window.

To minimize the project schedule, Orion will review the following options in the Preconstruction Phase to reduce the overall schedule:

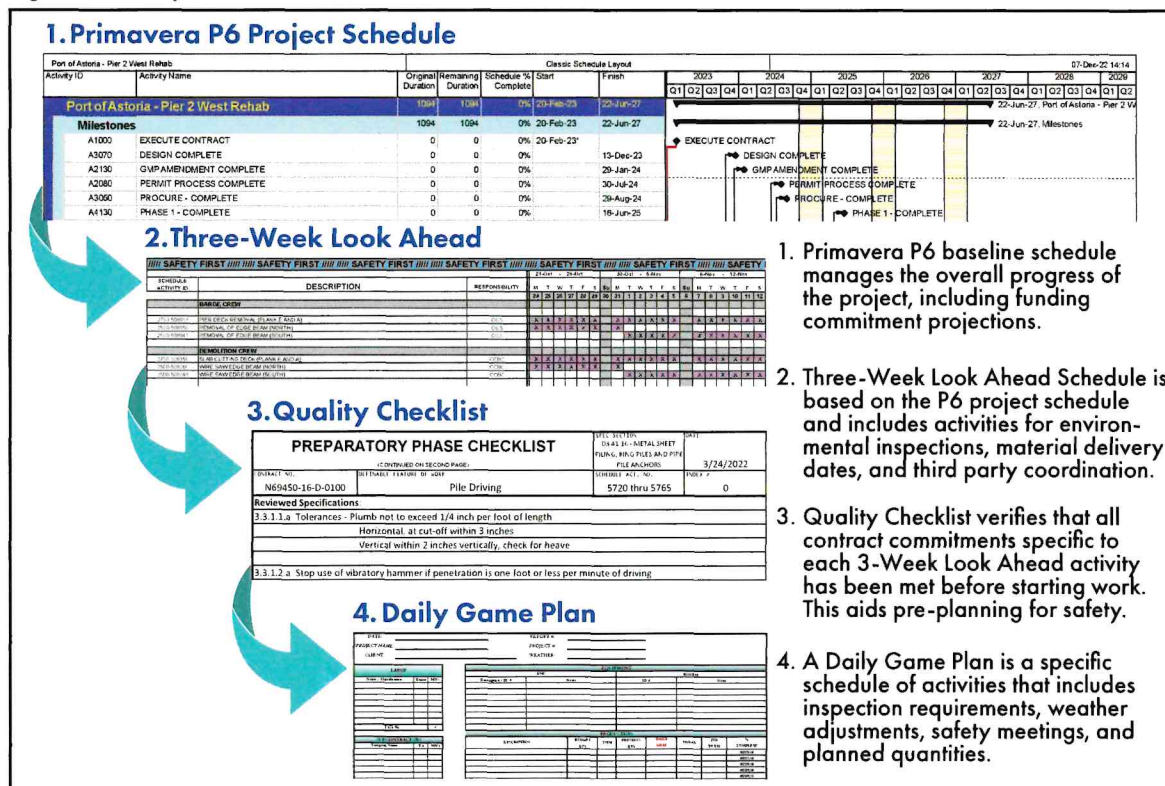
Reduce construction phasing from three to two phases

- Review warehouse logistics for feasibility
- Request longer in-water work window in the permit application for the first two seasons to reduce overall time of in-water work through three phases

Orion utilizes the schedule flow process in *Figure 5.1* to coordinate the project schedule with detailed weekly and daily work plans, which are used to document progress and accurately update the project schedule each month.

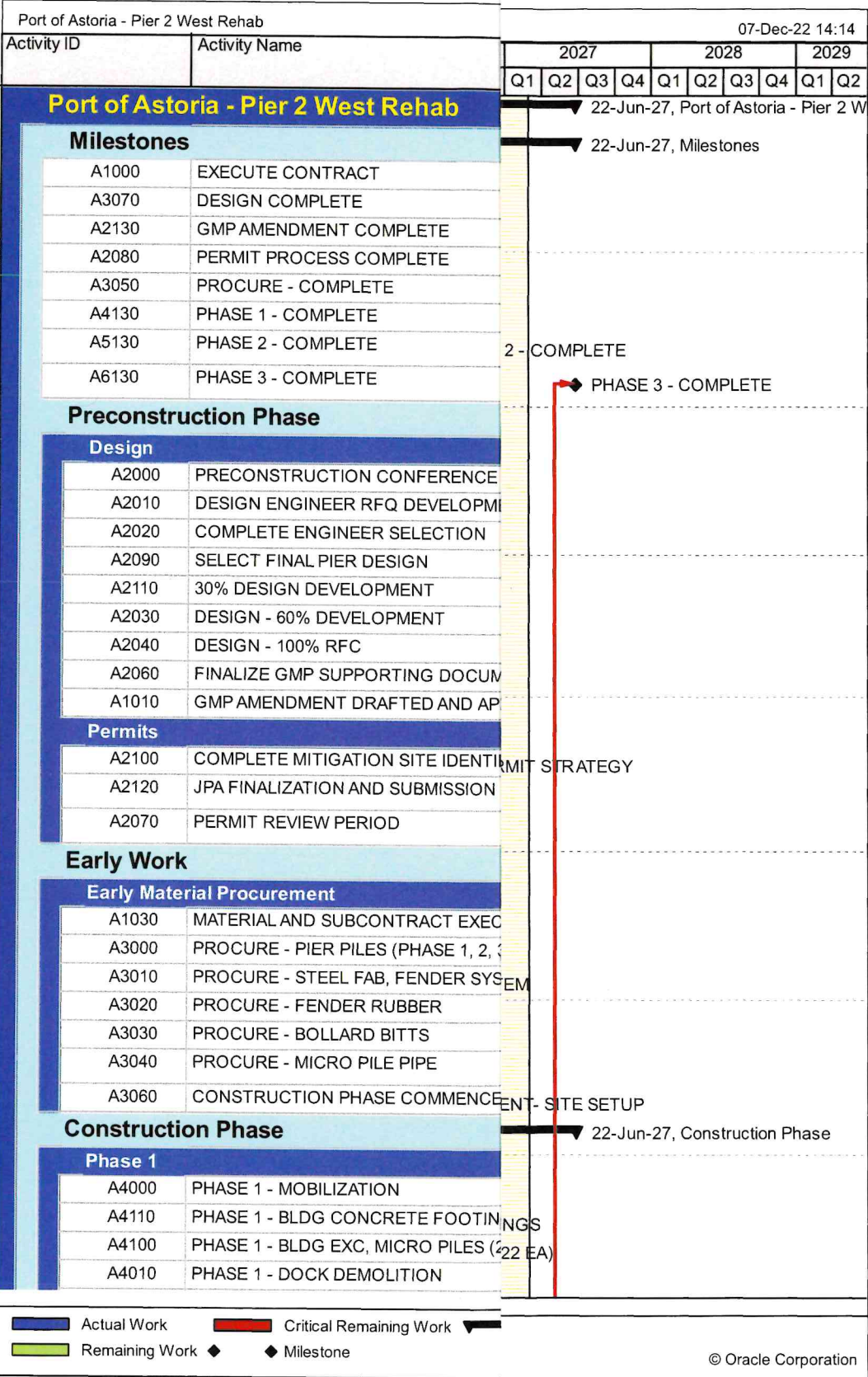
Our project schedule is provided on the following two pages.

Figure 5.1 - Project Schedule Flow Process



1. Primavera P6 baseline schedule manages the overall progress of the project, including funding commitment projections.
2. Three-Week Look Ahead Schedule is based on the P6 project schedule and includes activities for environmental inspections, material delivery dates, and third party coordination.
3. Quality Checklist verifies that all contract commitments specific to each 3-Week Look Ahead activity has been met before starting work. This aids pre-planning for safety.
4. A Daily Game Plan is a specific schedule of activities that includes inspection requirements, weather adjustments, safety meetings, and planned quantities.

Project Schedule



Project Schedule (continued)

Port of Astoria - Pier 2 West Rehab		07-Dec-22 14:14									
Activity ID	Activity Name	2027				2028				2029	
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2
A4120	PHASE 1 - BLDG BACKFILL, CONCRETE SOG										
A4020	PHASE 1 - PILE DRIVING										
A4030	PHASE 1 - WALER, TIEBACK ANCHORS										
A4040	PHASE 1 - BACKFILL OPERATION										
A4050	PHASE 1 - CONCRETE CAP										
A4060	PHASE 1 - STORM DRAINAGE, WATER UTILITY										
A4070	PHASE 1 - PCCP SURFACING (WHITE PAVING)										
A4080	PHASE 1 - FENDER SYSTEM										
A4090	PHASE 1 - MOORING BITTS, ET AL										
Phase 2		26-Jun-26, Phase 2									
A5140	PHASE 2 - OPERATION PLANNING										
A5000	PHASE 2 - MOBILIZATION										
A5100	PHASE 2 - BLDG EXC, MICRO PILES (22 EA)										
A5110	PHASE 2 - BLDG CONCRETE FOOTINGS										
A5120	PHASE 2 - BLDG BACKFILL, CONCRETE SOG										
A5010	PHASE 2 - DOCK DEMOLITION										
A5020	PHASE 2 - PILE DRIVING										
A5030	PHASE 2 - WALER, TIEBACK ANCHORS										
A5040	PHASE 2 - BACKFILL OPERATION										
A5050	PHASE 2 - CONCRETE CAP										
A5060	PHASE 2 - STORM DRAINAGE, WATER UTILITY										
A5070	PHASE 2 - PCCP SURFACING (WHITE PAVING)										
A5080	PHASE 2 - FENDER SYSTEM										
A5090	PHASE 2 - MOORING BITTS, ET AL										
Phase 3		22-Jun-27, Phase 3									
A6140	PHASE 3 - OPERATION PLANNING										
A6000	PHASE 3 - MOBILIZATION										
A6100	PHASE 3 - BLDG EXC, MICRO PILES (22 EA)										
A6110	PHASE 3 - BLDG CONCRETE FOOTINGS										
A6120	PHASE 3 - BLDG BACKFILL, CONCRETE SOG										
A6010	PHASE 3 - DOCK DEMOLITION										
A6020	PHASE 3 - PILE DRIVING										
A6030	PHASE 3 - WALER, TIEBACK ANCHORS										
A6040	PHASE 3 - BACKFILL OPERATION										
A6050	PHASE 3 - CONCRETE CAP										
A6060	PHASE 3 - STORM DRAINAGE, WATER UTILITY										
A6070	PHASE 3 - PCCP SURFACING (WHITE PAVING)										
A6080	PHASE 3 - FENDER SYSTEM										
A6090	PHASE 3 - MOORING BITTS, ET AL										

█ Actual Work █ Critical Remaining Work █ Remaining Work ◆ Milestone

Section 6

Public Entity Experience

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◇ Alaska ◇ Atlantic Seaboard ◇ Canada ◇ Caribbean Basin ◇ Gulf Coast ◇ West Coast ◇

Public Entity Experience

Orion has extensive experience working with public entities to deliver complex construction projects under a variety of contracting models. We are familiar with Oregon prevailing wage requirements.

Advertising & Contract Requirements for Subcontractors

At the preconstruction conference Orion will provide the Port a detailed subcontractor selection plan which is summarized in *Figure 4.2 of Section 4-Project Approach*. Orion will utilize the preconstruction process to develop subcontractor scopes, identify small business opportunities, validate subcontractor capabilities, and engage the subcontracting community early in the project. Presolicitation notices will be advertised utilizing commercially available and common communication channels, including plan rooms and Daily Journal of Commerce. To enhance HSE performance, Orion will post our safety policy with presolicitation notices for interested subcontractors to review to ensure safety compliance on the project. During final subcontractor solicitation in the Construction Phase, notices will be similarly advertised utilizing public channels. Orion will provide the final subcontract form with owner contract provisions for review in the final solicitation notice. Subcontractors shall be obligated to conform to all standards related to the performance of all work performed that is imposed on Orion, to the extent applicable to the relevant subcontractor. Orion will take all reasonable precautions to ensure that all subcontractors are financially sound and capable of complying with all conditions of any Agreements or Contract documents prepared by Orion.

Reporting to the Bureau of Labor and Industries (BOLI)

Orion complies with all employment and civil rights laws covered by BOLI. We set high standards for our employees. Much of this is captured in Orion's Guiding Beliefs, which are centered on Quality, Safety, and Production with each built upon the all-important foundation of integrity. Our Policies and Procedures is available to all of our employees and contains a complete compilation of Orion's employment-related policy matters and addresses specific policy questions and procedures.

Certifying Payroll Consistent with Legal Requirements

As a general contractor who performs a substantial number of public works projects, Orion is fully compliant with all labor requirements and certified payroll processes.

Section 7

Other Requirements

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Other Requirements

Below are Orion's responses to the 'Other Requirements' as provided in the RFP.

Resident Bidder

Orion is not considered a "Resident Bidder" as defined in ORS 279A.120.

Other Provisions

Orion agrees to be bound by and will comply with all applicable state and federal laws, including but not limited to ORS 279C.838, 279C.840, and 40 U.S.C. 3141 to 3148.

Asbestos Abatement

Orion is not required to be licensed for asbestos abatement and will subcontract the abatement scope for these structures to a qualified subcontractor as a direct report to Jason Tarver, General Superintendent.

Employment of Subcontractors

Orion intends to provide pricing and compete with subcontractors on all marine scopes of work including, but not limited to, bulkhead sheetpile, anchor pile, temporary shoring, fender system, wall cap concrete, and mooring bits. Orion will follow the RFP requirements for subcontractor procurement that is supported by our subcontractor selection process detailed in *Section 4-Project Approach* to provide the Port of Astoria the lowest cost for all scopes of work on the project.

Responsibility Determination Form Checklist

GENERAL INFORMATION

Project Name: CM/GC Pier 2 West Rehabilitation

Bid Number: N/A

Business Entity Name: Orion Marine Contractors, Inc.

CCB License Number: 193949

Submitted by (Contracting Agency): Orion Marine Contractors, Inc.

Submitted by (Contracting Agency Representative's Name): Brian Masten

Title: Vice President

Date: December 16, 2022

Orion has:

<input checked="" type="checkbox"/>	Checked the list created by the Construction Contractors Board under ORS 701.227 for bidders who are not qualified to hold a public improvement contract.	<i>Orion is qualified to hold a public improvement contract.</i>
<input checked="" type="checkbox"/>	Met the standards of responsibility. In so doing, Orion:	<i>Orion meets the standards of responsibility.</i>
<input checked="" type="checkbox"/>	Has available the appropriate financial, material, equipment, facility and personnel resources and expertise, or the ability to obtain the resources and expertise, necessary to meet all contractual responsibilities.	<i>Orion has the available appropriate financial, material, equipment, facility, and personnel resources and expertise, or the ability to obtain the resources and expertise, necessary to meet all contractual responsibilities.</i>
<input checked="" type="checkbox"/>	Holds current licenses that businesses or service professionals operating in this state must hold in order to undertake or perform the work specified in the contract.	<i>Orion holds current licenses that businesses or service professional operating in this state must hold in order to undertake or perform work specified in the contract.</i>
<input checked="" type="checkbox"/>	Is covered by liability insurance and other insurance in amounts required in the solicitation documents.	<i>Orion is covered by liability insurance and other insurance in amounts required in the solicitation documents. Our Sample COI follows this page.</i>
<input checked="" type="checkbox"/>	Qualifies as a carrier-insured employer or a self-insured employer under ORS 656.407 or has elected coverage under ORS 656.128.	<i>Orion qualifies as a carrier-insured employer under ORS 656.407.</i>
<input checked="" type="checkbox"/>	Has a satisfactory record of performance.	<i>Orion has a satisfactory record of performance.</i>
<input checked="" type="checkbox"/>	Has a satisfactory record of integrity.	<i>Orion has a satisfactory record of integrity.</i>
<input checked="" type="checkbox"/>	Is legally qualified to contract with the contracting agency.	<i>Orion is legally qualified to contract with the Port of Astoria.</i>
<input checked="" type="checkbox"/>	Possesses a certificate that the Oregon Department of Administrative Services issued under ORS 279A.167.	<i>Orion poses a certificate that the Oregon Department of Administrative Services issued under ORS 279A.167.</i>
<input checked="" type="checkbox"/>	Agrees to be bound by the terms and conditions of a community benefit contract if the public contract is a community benefit contract.	<i>Orion agrees to be bound by the terms and conditions of a community benefit contract if the public contract is a community benefit contract.</i>
<input checked="" type="checkbox"/>	Has supplied all necessary information in connection with the inquiry concerning responsibility.	<i>Orion has supplied all necessary information in connection with the inquiry concerning responsibility.</i>
<input checked="" type="checkbox"/>	Determined to be (check one of the following):	
<input checked="" type="checkbox"/>	Responsible under ORS 279C.375(3)(a) and (b).	<i>Orion is determined to be responsible under ORS 279C.375(3)(a) and (b).</i>
<input type="checkbox"/>	Not responsible under ORS 279C.375(3)(a) and (b).	



Sample Certificate of Insurance - Orion Marine Contractors, Inc. (continued)

CERTIFICATE NUMBER: ZVKZEN8C

COVERAGES		ADDL SUBR		POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
INSR LTR	TYPE OF INSURANCE	INSD	WVD					
A	COMMERCIAL GENERAL LIABILITY <input checked="" type="checkbox"/> MARINE GENERAL LIABILITY CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR <input checked="" type="checkbox"/> Limited Pollution - Time Element <input checked="" type="checkbox"/> Incl Contractual GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input checked="" type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:			MS-S 6755	02/28/2022	02/28/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS-COMP / OP AGG \$ 2,000,000	
E	AUTOMOBILE LIABILITY <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> ALL OWNED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS <input checked="" type="checkbox"/> HIRED AUTOS			AS5-691-449823-142	10/01/2022	10/01/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$	
B	WORKERS COMPENSATION AND EMPLOYERS LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? <input type="checkbox"/> Y/N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below <input checked="" type="checkbox"/> ALTERNATE EMPLOYER <input type="checkbox"/> USL&H ENDORSEMENT <input type="checkbox"/> MARITIME EMPLOYERS LIABILITY <input type="checkbox"/> OCSL ACT		N/A	WCSIG35010404 Stop Gap Employers Liability (WA Only)	10/01/2022	10/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. (Each accident) \$ 1,000,000 E.L. DISEASE (Ea employee) \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000	
C	U.S. LONGSHORE & HARBOR WORKERS COMPENSATION ACT <input checked="" type="checkbox"/> ALTERNATE EMPLOYER <input checked="" type="checkbox"/> MARITIME EMPLOYERS LIABILITY <input checked="" type="checkbox"/> OCSL ACT		N/A	19100	10/01/2022	10/01/2023	<input checked="" type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. (Each accident) \$ E.L. DISEASE (Ea employee) \$ E.L. DISEASE - ANN AGG \$ Contingent MEL \$ 10,000,000	
	AIRCRAFT LIABILITY <input type="checkbox"/> OWNED AIRCRAFT <input type="checkbox"/> NON-OWNED AIRCRAFT <input type="checkbox"/> PASSENGER LIABILITY						EACH OCCURRENCE \$ AGGREGATE \$	
A	UMBRELLA / EXCESS LIAB / BUMBERSHOOT <input type="checkbox"/> UMBRELLA <input checked="" type="checkbox"/> BUMBERSHOOT <input type="checkbox"/> EXCESS CLAIMS MADE <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> DED <input type="checkbox"/> RETENTION \$			MS-S 6916 MS-S 6917	10/01/2022	10/01/2023	EACH OCCURRENCE \$ 20,000,000 AGGREGATE \$ 20,000,000	
	ENERGY CONTROL OF WELL / OPERATORS EXTRA EXPENSE <input type="checkbox"/> CARE, CUSTODY AND CONTROL (CCC) OFFSHORE OIL AND GAS PROPERTY <input type="checkbox"/> PLATFORMS <input type="checkbox"/> PIPELINES ONSHORE OIL AND GAS PROPERTY <input type="checkbox"/> OIL & GAS PROPERTY <input type="checkbox"/> CONTRACTORS EQUIPMENT NAMED WINDSTORM <input type="checkbox"/> CCC <input type="checkbox"/> OFF-SHORE <input type="checkbox"/> ON-SHORE						CSL, ANY ONE OCCURRENCE (100% interest) \$ ANY ONE OCCURRENCE (100% interest) \$ VALUES AS SCHEDULED \$ VALUES AS SCHEDULED \$ VALUES AS SCHEDULED \$ VALUES AS SCHEDULED \$ VALUES AS SCHEDULED \$ VALUES AS SCHEDULED \$ AGGREGATE \$	
VESSEL(S):		AS PER ATTACHED SCHEDULE		AS DETAILED IN THE DESCRIPTION OF OPERATIONS				
DESCRIPTION OF OPERATIONS / LOCATIONS (ACORD 101, Additional Remarks Schedule, may be attached, if more space is required)								

Port of Astoria – Real Estate Leasing Agent

Notice of Intent to Award

February 2, 2023

On December 21, 2022, the Port of Astoria received three responsive, responsible proposals in response to its Request for Proposals for a Real Estate and Leasing Agent.

Based on final scores, the Port hereby issues this Notice of Intent to award the contract for a Real Estate Leasing Agent to Popkin Real Estate, LLC.

Written protests must be submitted to Executive Director Will Isom at admin@portofastoria.com by 5 p.m. on February 9, 2023, and must clearly state the basis for the protest.

The contract is scheduled for provisional approval by the Port's Board of Commissioners on February 7, 2023, conditioned upon the resolution of any written protests received by the end of the protest period.

Real Estate and Leasing Agent Proposal Evaluation Form

Bids will be evaluated on “best value” based on the evaluation criteria as stated below. A 100-point scale will be used to create the final evaluation recommendation. When assessing points, utilize a 1-10 scale which will then be multiplied by the weight assigned.

Points	Guidance
10	Couldn't imagine a better response
9-8	Excellent, insightful response
7-6	More than adequate response
5-4	Adequate response, no special insights
3-2	Inadequate response
1-0	Totally inadequate response
0	No response given

Criteria Number	Factor	Weight
1	Proposal Suitability	30%
2	Demonstrated Experience	35%
3	Cost and Value	35%

Real Estate and Leasing Agent Proposal Evaluation Summaries

Evaluators: Melanie Howard, Will Isom, Matt McGrath

Date Evaluated: 1/13/2023

Marcus & Millichap

Criteria	Total Points
Criteria 1 – Proposal Suitability	17
Criteria 2 – Demonstrated Experience and Success	22
Criteria 3 – Cost and Value	24.5
TOTAL SCORE	63.5

Popkin Real Estate, LLC

Criteria	Total Points
Criteria 1 – Proposal Suitability	22.5
Criteria 2 – Demonstrated Experience and Success	28.5
Criteria 3 – Cost and Value	30.5
TOTAL SCORE	81.5

Cushman & Wakefield / APEX Real Estate

Criteria	Total Points
Criteria 1 – Proposal Suitability	21
Criteria 2 – Demonstrated Experience and Success	30.5
Criteria 3 – Cost and Value	28
TOTAL SCORE	79.5

PORT OF ASTORIA
REQUEST FOR PROPOSALS (RFP)

For a
REAL ESTATE AND LEASING AGENT

Proposal Contact:

Will Isom, Executive Director
(503) 741-3300
admin@portofastoria.com

Estimated Award Timeline:

Date of Issuance: November 8, 2022
Proposal Due Date: December 21, 2022
Tentative Date of Award: February 2, 2023

INTRODUCTION. The Port of Astoria is a public port district formed in 1910. The Port derives its authority from Oregon Revised Statutes chapter 777. It is governed by a locally elected Board of Commissioners. The Port is located on the Oregon coast in the northwest corner of the state, where the Columbia River meets the Pacific Ocean. Its geographic boundary includes the entirety of Clatsop County, Oregon.

The Port owns and manages a combination of marine, marina, industrial, and aviation facilities. These facilities are primarily located in the City of Astoria (Port waterfront properties and infrastructure) and the City of Warrenton (airport and industrial properties). The Port offers services to commercial and recreational boaters at its two marinas and boatyard, and to commercial and cargo vessels, fish processing, cruise ships, and research vessels at its deep-draft marine terminals. It also operates the Astoria/Warrenton Regional Airport. The Port has industrial and commercial leasing opportunities on its properties at the Airport, Skipanon Peninsula, and waterfront locations.

The Port's Board of Commissioners recently approved an ambitious Waterfront Master Plan that contemplates a variety of expansions and improvements to Port facilities to benefit and promote the local economy, commercial interests, and tourism. The Master Plan can be viewed at the following link: [Port of Astoria - Waterfront Master Plan](#). For more information about the Port, including its current Strategic Business Plan, see the Port's website at [Port of Astoria - About the Port of Astoria](#).

PROJECT DESCRIPTION. The Port seeks an ongoing, long-term contract with one or more experienced, qualified individuals or firms to represent the Port in sales and purchases of real property, and to act as a leasing agent in procuring and negotiating commercial leases on behalf of the Port.

COMPENSATION. The selected Contractor(s) will be compensated on a commission basis as set forth in the contract agreed to by the parties. Necessary vehicle mileage and meal and lodging expenses incurred in the performance of the contract will be reimbursed at actual cost.

No Proposer, including the Contractor selected for award, if any, will be compensated for pre-award costs. All pre-award expenditures are made at the Proposer's own risk and expense.

PROPOSAL FORMAT. Proposals must be in the form of a Proposal package that includes the following:

- 1) A narrative no more than ten (10) pages in length that describes the Proposer's:
 - (a) Project understanding;
 - (b) Familiarity with the commercial real estate market in Oregon generally, and in Clatsop County in particular;
 - (c) Project approach, including the Proposer's methods and strategies for:

- Marketing commercial properties for sale or lease by the Port, including deliverables provided to the client;
 - Identifying properties available for possible purchase by the Port, including deliverables provided to the client; and
 - Negotiating purchases, sales, and leases of commercial properties;
- (d) Staff who will be performing the services described in this RFP;
- (e) Contractor qualifications, including any licenses and certifications required under Oregon law;
- (f) Examples of at least three (3) projects within the previous five (5) years that demonstrate experience and success in completing purchases and sales of commercial properties. For each example, include contact information for the client represented in the transaction. Specifically identify transactions completed on behalf of a public entity in Oregon;
- (g) Examples of at least three (3) projects within the previous five (5) years that demonstrate experience and success in locating prospective lessees and negotiating commercial leases. For each example, include contact information for the client represented in the transaction. Specifically identify transactions completed on behalf of a public entity in Oregon;
- 2) A one-page description of compensation terms, including expected rates of commission on completed transactions, and reimbursable expenses. Describe any financial incentives or discounts available to the Port.

PROPOSAL DELIVERY INSTRUCTIONS. Proposals must be submitted in the form of one PDF file that does not exceed 5MB size, exclusively by email to admin@portofastoria.com, with the subject line “Proposal for Real Estate and Leasing Agent.” **Proposers are encouraged to confirm delivery with the contact person prior to proposal due date.**

Proposals must be received no later than the due date specified on the cover page. Late proposals will not be accepted.

PROPOSAL EVALUATION. The Port will create an evaluation committee to evaluate and score Proposals. Any attempt by a Proposer to improperly influence a member of the evaluation committee during the Proposal review and evaluation process will result in the elimination of that Proposer’s Proposal from consideration. Qualifying Proposals will be evaluated based on the following criteria, with no specific weight assigned to each:

- 1) Proposal Suitability: Quality and clarity of the approach that will be used to successfully complete the project specifications.

- 2) Demonstrated Experience and Success: Staff expertise, qualifications, and past performance as they apply to the project specifications.
- 3) Cost and Value: Proposed costs for the services requested, considering industry standard and market rates.

CONTRACT AWARD. In its sole discretion, the Port may select one or more Proposers for an interview, or award one or more contracts without conducting interviews. All contracts are subject to approval by the Port's Board of Commissioners. The Port makes no guaranty that a contract, if awarded, will be exclusive to the successful Proposer. If an apparent successful Proposer and the Port are not able to execute a mutually acceptable agreement within ten (10) business days of the contract award, or such later date as the Port may authorize, the Port may terminate negotiations with the Proposer. If all Proposals are rejected, all Proposers will be promptly notified.

RESERVATION OF RIGHTS. The Port of Astoria reserves all rights regarding this RFP including, without limitation, the right to:

- Cancel the solicitation, or reject in whole or in part any or all Proposals when doing so is in the best interest of the Port or the public;
- Modify the proposed timeline for this RFP with appropriate notice to prospective Proposers. The proposed dates represent a tentative schedule of events. All times are local;
- Waive any minor irregularity, informality, or non-conformance with the provisions or procedures of this RFP, and seek clarification of any Proposal, if required;
- Reject any Proposal that fails to substantially comply with all prescribed RFP procedures and requirements;
- Engage contractors by selection or procurement independent of this RFP and/or any contracts awarded pursuant to this RFP; and
- Negotiate with one or more successful Proposers to develop a Scope of Services and contract terms consistent with this RFP.

QUESTIONS. All questions regarding this solicitation must be directed to the Proposal Contact listed on the cover page of this RFP. No other person or entity is authorized to provide information regarding this RFP and any information so obtained shall be of no effect.



Mark Popkin
(503) 440-4200
mark@popkinre.com
Oregon License Number 970700183

Dave Koller
619-977-5040
dave@popkinre.com
Oregon License Number 201239725

Thank you for your consideration as candidates for the Port of Astoria real estate and leasing agents. We come to the table with vast local knowledge as well as the skill base that will serve the Port of Astoria in accomplishing the goals set forth in the Waterfront Master Plan.

Whether facilitating housing projects or finding commercial space for our local business to meet their growing needs we take pride in the community. We have studied the waterfront proposal and are excited to see the West Mooring Basin area reach a higher potential and become a greater asset for the community. We support the Port's vision of working waterfront businesses coupled with opportunities for local businesses to support travel and recreation. The property is well situated to attract a wide variety of local businesses.

In 1997 Mark moved to Astoria Oregon to join his brother Larry in his growing real estate business. Mark fell in love with the community. Over the last 25 years, Mark has grown a successful real estate business and established connections far beyond Clatsop County. After doing hundreds of residential transactions, Mark saw the need for a commercial specific realtor in Clatsop County and began to take additional business courses. For the last decade, he has concentrated his career on commercial real estate on the Northern Oregon Coast. He is drawn to the business side of the real estate industry. Two years ago, Mark added Dave Koller to his team. Mark recognized Dave's business talents and together they are a formidable real estate team. Dave has extensive contacts and great relationships on the coast with over 20 years' experience operating a successful business and developing property in Seaside and Cannon Beach. He has experience negotiating commercial leases and developing commercial property from a business perspective. He has worked with the City of Seaside on several real estate development projects.

What is best about Mark and Dave is that they care about their clients and community. Mark has sat on the Board for the local "Lunch Buddy" program and currently sits on the Seaside Housing Alliance. Dave currently sits on the board of the Astoria Regatta and the Astoria Yacht Club. Both are recognized in the community and are proud of the reputations they have established here.

Mark has previously owned property on the Astoria waterfront, Pier 11 and the adjacent fish market. He is well versed in State Land Leases and the intricacies associated with selling and leasing properties on the Astoria waterfront. Most recently Mark is involved with the waterfront housing project on 30th St. known as North Post 66. Mark also facilitated the transaction for the current Fort George waterfront location. This project was challenging and involved state and federal monitoring for clean-up. This transaction was a three-year process and required a skilled commercial agent. Mark was recognized by the Northwest Regional CCIM for the transaction of the year.

Dave has been a user of the West Mooring Basin since he moved to the area over 20 years ago and is familiar with the property and some of the complexities facing development. He owns a sailboat in the West Mooring Basin and has known the area holds a lot of potential not only for the Port but for the entire community. The mix use opportunities are numerous, and the Waterfront Master Plan will without a doubt enhance the area.

There is obviously a lot of work to be done and communication between associated parties will be important to ensure the process moves efficiently. We pride ourselves on communication and availability to our clients. Even before the structures are razed, the search should start for potential tenants and lease holders. We work as a team and each provide a unique perspective to both our clients and current development projects we are involved with. This knowledge will be helpful as the Port implements resources for future business. We have experience working with local municipalities and government organizations.

Through our proven success, locally and regionally, we feel like we are the most well qualified candidates to market and find solutions for the Port of Astoria. The following are not complete lists of our transactions or negotiations. Please feel free to ask for references or any additional necessary information.

Best Regards,

Mark Popkin and Dave Koller

The following is a list of some notable commercial transactions Mark and Dave closed in 2022:

- Astor Court Apartments in Astoria (\$1.4 million)
Sold to out of state buyer represented by us
- Gearhart Storage in Gearhart (\$1.4 million)
Distressed property with challenging circumstances
- 470 Roosevelt in Seaside (\$800,000)
Previously listed with another brokerage for over two years
Property was in the process of an ODOT “taking”
- City Center Motel in Seaside (\$1.1 million)
- Commercial acreage on Dolphin Ave. (\$600,000)
Property had easement complications
- 397 and 261 Marine Dr. in Astoria (\$400,000 and \$450,000)
Commercial locations in Astoria with existing commercial leases
- Inn at Four Winds in Seaside (\$2.6 million)
Oceanfront Hotel
- 1511-1535 Commercial St. in Astoria (\$2.2 million)
Current location of Roby’s Furniture

The following is a list of several commercial lease transactions we have negotiated recently:

- Many of our commercial sale transactions involve the comprehension of the leases that effect the financing and their viability.
- Negotiated a lease for Fort George Brewery with the Division of State Lands
- Currently working with a client on a commercial lease with Columbia Bank
- Negotiated the lease for Cleanline Surf Shop in Cannon Beach

Compensation Terms:

All closed sale transactions shall be at 5% with a 50/50 split between the listing and buying brokerages.

All leases shall be at 5% of the overall value of the lease.

Marcus & Millichap

111 SW Fifth Avenue
Suite 1950
Portland, OR 97204
Tel: (503) 200-2000
Fax: (503) 200-2010
www.MarcusMillichap.com

Port of Astoria
Request for Proposal
Commercial Real Estate Agent Proposal
December 12, 2022

Project Description: The Port seeks an ongoing, long-term contract to represent the Port in sales and purchases of real property, and to act as a leasing agent in procuring and negotiating commercial leases on behalf of the Port.

Marcus & Millichap, the nation's largest investment property brokerage, through its First Vice President, Will Stone, and staff, submits this proposal to serve as buying, selling, and leasing agent.

Compensation: Varies depending on the size of the project. Typical commission is as follows:

- \$2,000,000 or less 6%
- \$2-\$5,000,000 5%
- \$5,000,000 and larger 4%
- Leases 5% on contracted lease payments
- Or as negotiated on individual projects as needed.
- There are no reimbursable expenses, generally. In the unlikely event something out of the ordinary arose, it would be requested and approved in advance.

Proposal Format:

See Attachment 1 describing Marcus & Millichap Advantage

- (a) Project understanding: Will Stone has lived on the Oregon Coast for the last 20 years and understands the coastal economy. He has listed and sold investment properties in Clatsop, Tillamook, Lincoln and Coos Counties. He has also completed projects in Washington, Idaho, Oregon, Utah, Arizona, Texas, Missouri, Virginia, Florida and elsewhere. He has a bachelor's degree in economics and business and a master's in business administration. He has a strong management background which clients appreciate because he views projects from the client's perspective. His strong economic, business, and development background is applicable to the Port of Astoria project.
- (b) Will Stone has been marketing all product types of commercial and development properties since 2009 throughout Oregon and the US. He has closed more than \$200,000,000 in investment and development properties. He is available to clients and excellent at follow through.
- (c) He has worked in many product types included in the Port of Astoria property including hospitality, industrial, retail, land development and mixed use residential.
- (d) Marcus & Millichap is a national company committed to broadly marketing their listings through its network of 80 offices and 2000 brokers so that offerings are exposed to as many qualified buyers and developers as possible. The goal is to create a market for the listing so that the competition for yield the best offers.
- (e) Marcus and Millichap can market to potential development and investor clients throughout the Oregon Coast, Oregon, the Northwest and nationally and internationally as required.

Marcus & Millichap

Real Estate Investment Services

- (f) Will Stone has experience assembling development properties and is comfortable representing the Port in acquiring additional real estate properties.
- (g) Because Marcus & Millichap specializes in investment sales, Will Stone has some but not extensive leasing experience. Nonetheless, he is comfortable with leasing projects either working alone or with others.
- (h) Team members from Marcus & Millichap who would work on the project include:
 - Will Stone: Broker and lead.
 - David Tabata: Sales Manager, liaison to other Marcus & Millichap offices
 - Jess Morse: Operations Manager, contract, technical and marketing support
 - Rachel Lee: Marketing Coordinator, marketing materials and graphic design projects
- (i) Will Stone is an active, licensed real estate Broker.
- (j) Project examples:

Sales and Acquisitions

- Teen Challenge Pacific Northwest - Identified new nonprofit headquarters. CEO, Chris Hodges 971-255-0658. Provided numerous possible headquarters sites to consider. The final selection was acquired after negotiating a 23% discount from the list price.
- Deacon Development – Completed several assignments to acquire mixed-use development sites. Director of Development, Pete Snook 503-297-8791.
- Old Mill RV Park, Garibaldi - Analyzed business financials and created opinion of value well above competitors' bids and delivered multiple offers at or above the list price. Seller, Doug Rosenberg 503- 842-4191.

Leasing

- Owner, Joe Green 503-970-2927. While selling two properties for the owner in Lake Oswego, Oregon and Tigard, Oregon, property vacancies were marketed for lease leading to the ultimate purchase by a building tenant.
- Teen Challenge Pacific Northwest (2) - Identified and negotiated leases for a non-profit headquarters and a thrift store. CEO, Chris Hodges, 971-255-0658.

I will be happy to interview for the assignment. It will likely serve to convince the management that Marcus & Millichap and I would be an excellent choice.

Sincerely,

Will Stone
First Vice President Investments
111 SW 5th Avenue, Suite 1950, Portland, OR 97204
Office: (503) 200-2025
Cell: (503) 989-5141
Will.Stone@marcusmillichap.com
License: OR: 890400169
NYSE: MMI

A dark blue-tinted photograph of an outdoor patio area. In the foreground, there are several picnic tables with benches. To the left, there is a trash can. In the background, there is a building with large windows and some trees. The overall scene is dimly lit, suggesting dusk or dawn.

THE M&M ADVANTAGE

Marcus & Millichap

MARCUS & MILLICHAP PREMIER INVESTMENT SERVICES

Founded in 1971, Marcus & Millichap is the premier commercial real estate investment services firm in the United States. Our team of more than 2,000 professionals in the U.S. and Canada focuses exclusively on real estate investment sales, financing, research, and advisory services.



Founded in 1971 on a unique methodology



Largest pool of pre-qualified investors in the industry



Moves capital across our network of investment professionals



More than 2,000 investment professionals in the U.S. and Canada

WITH AN EXCLUSIVE FOCUS ON

real estate investment sales, financing, research, and advisory services

Marcus & Millichap

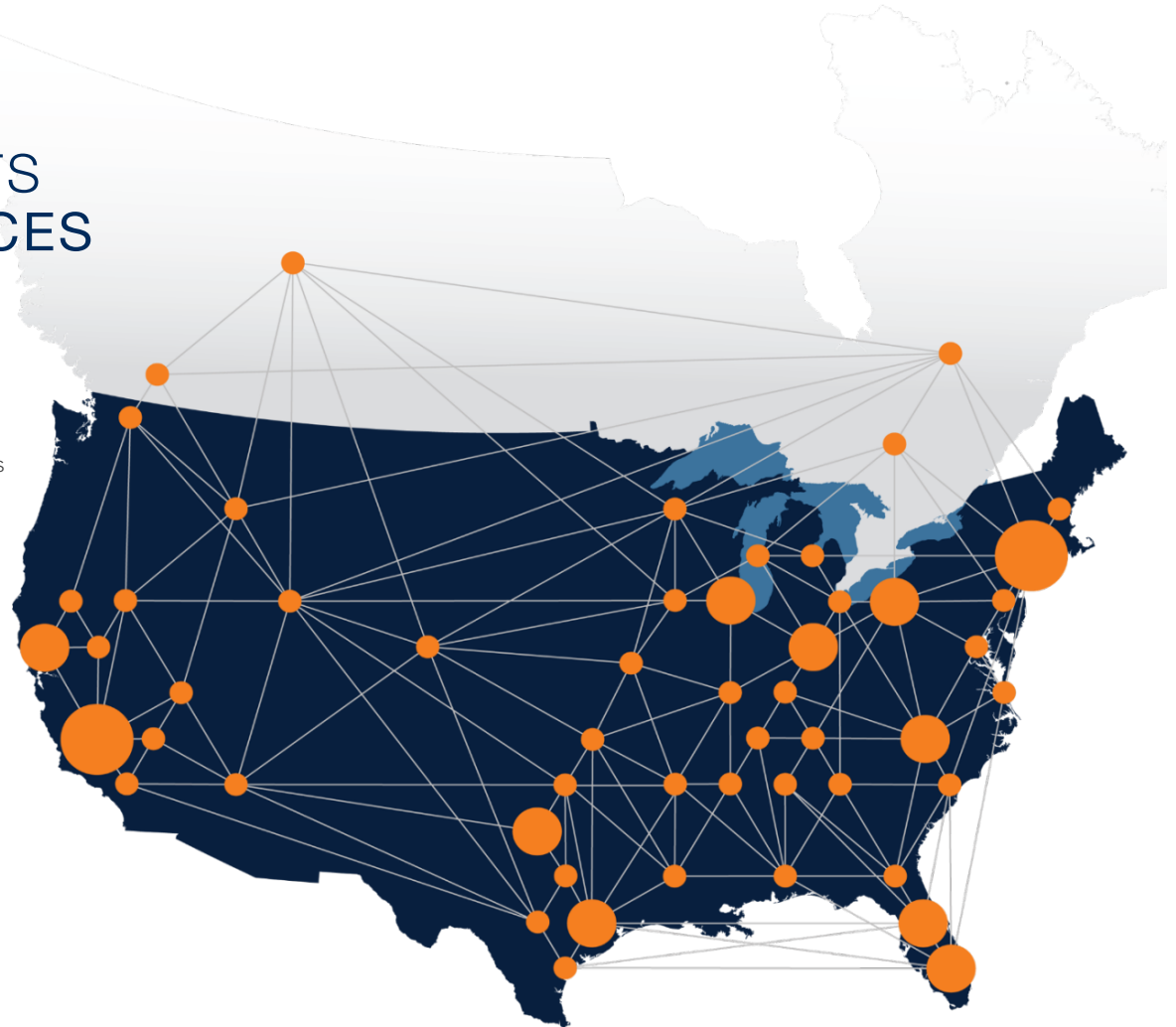
MORE THAN
2,000
INVESTMENT
PROFESSIONALS

WE HAVE ACCESS TO THE INDUSTRY'S **LARGEST** POOL OF PRIVATE & INSTITUTIONAL INVESTORS, RESULTING IN THE **MOST EFFICIENT** PROCESS FOR MATCHING BUYERS AND SELLERS, **LOCALLY, REGIONALLY, AND NATIONALLY.**

MAXIMIZING RESULTS WITH OVER 80 OFFICES THROUGHOUT THE U.S. & CANADA

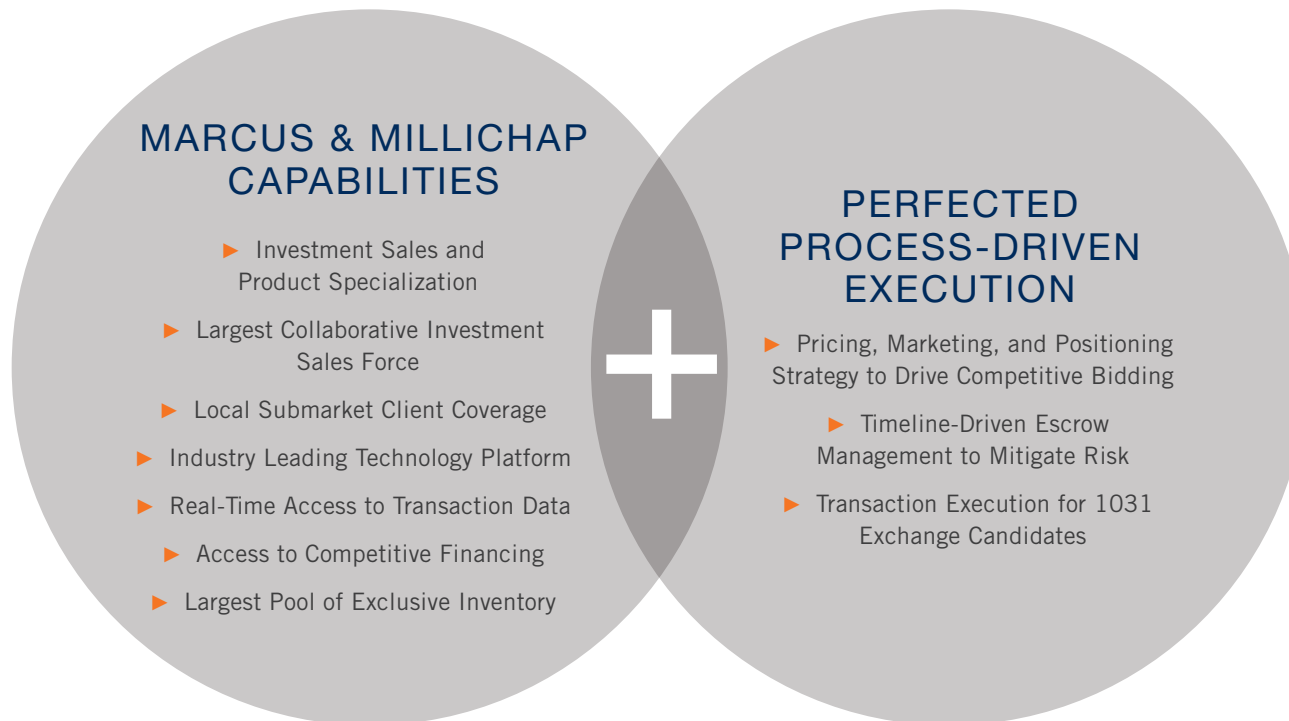
With our collaborative culture, cutting-edge technology and proven methodology, we efficiently match buyers and sellers both regionally and nationally to maximize your success.

***MOVING CAPITAL,
MAXIMIZING VALUE***



WIDE RANGE OF CAPABILITIES, PROVEN EXECUTION PROCESS

Our proprietary platform and wide range of capabilities maximize our client results. As an industry leader in closed transactions and with a history of repeat business, we have had decades of process-driven success that will ensure your success.



\$11B

TOTAL VALUE OF
RECENT LISTINGS

6.60

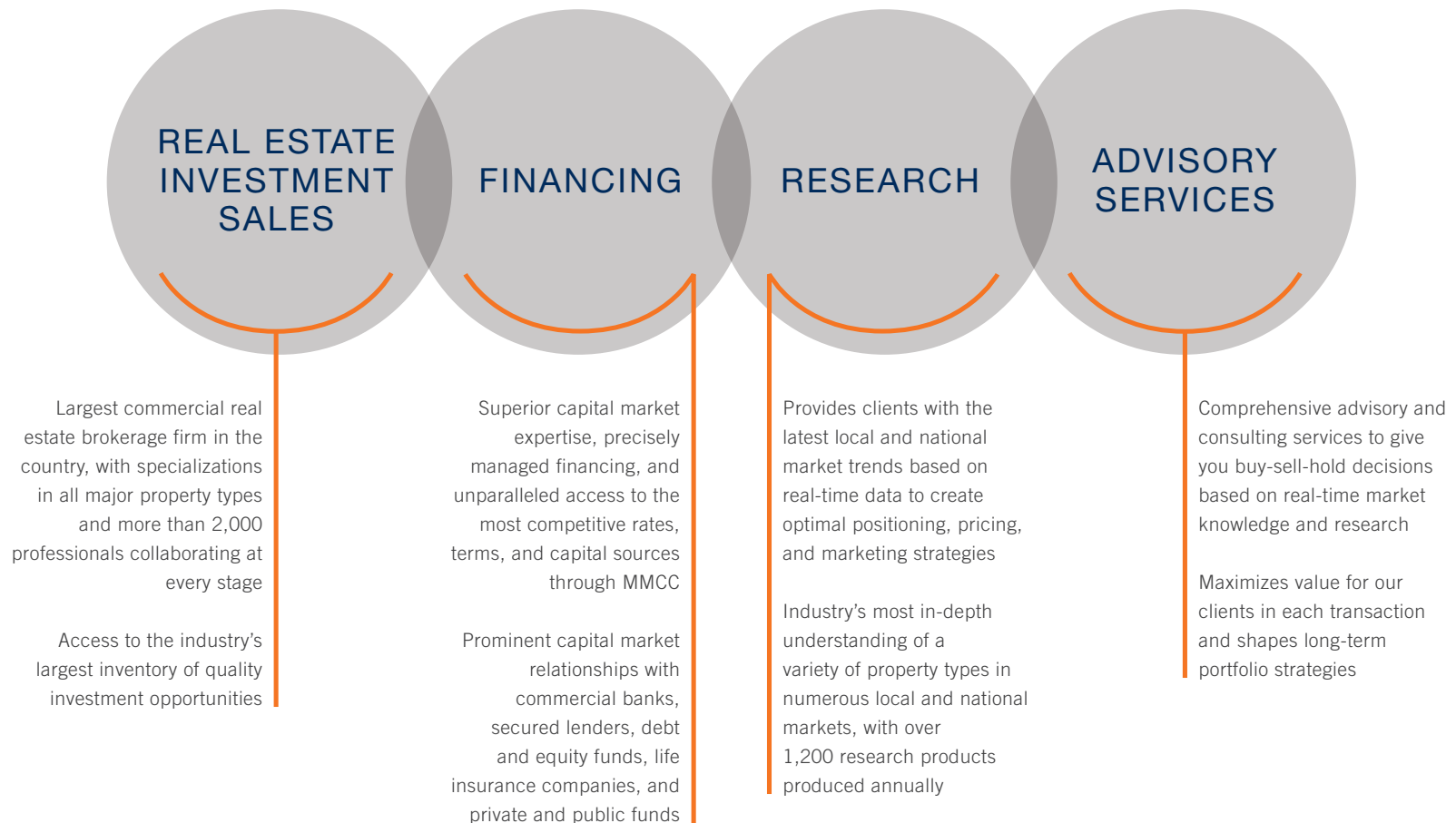
CLOSED TRANSACTIONS
EVERY BUSINESS HOUR

2,474

CLOSED FINANCINGS
IN 2021

THE MARCUS & MILLICHAP ADVANTAGE

At Marcus & Millichap, we tailor our investment strategies to meet the unique needs and goals of each client. To best serve our clients and to maximize value, we combine our collaborative culture with the world's most advanced technology to create the industry's most powerful proprietary marketing system.



SPECIALTY DIVISIONS

Because we cover a wide variety of property types, Marcus & Millichap gives you access to the industry's largest investment inventory. Through property specialization and information sharing, our investment professionals cultivate relationships across the U.S. and Canada. We leverage these relationships to provide our clients with the insight and opportunities to maximize their investments.



MULTI HOUSING



SINGLE TENANT
NET LEASE



RETAIL



OFFICE



HOSPITALITY



AFFORDABLE
HOUSING



FINANCING



INDUSTRIAL



SELF-STORAGE



HEALTHCARE



MANUFACTURED
HOUSING



SENIORS
HOUSING



STUDENT
HOUSING



LAND
& REDEVELOPMENT

THE MARCUS & MILLICHAP ADVANTAGE

When a client hires a local agent, the entire Marcus & Millichap team stands behind that agent. Each investment professional can leverage Marcus & Millichap's carefully cultivated network of local, regional, and national contacts in order to provide clients with access to our unmatched product inventory, large client base that is sourced both internally and externally, and excellent capital sourcing. Through maximum controlled exposure, our local agents create a maximum result for each client.



INVESTMENT OPTIONS AND OPPORTUNITIES

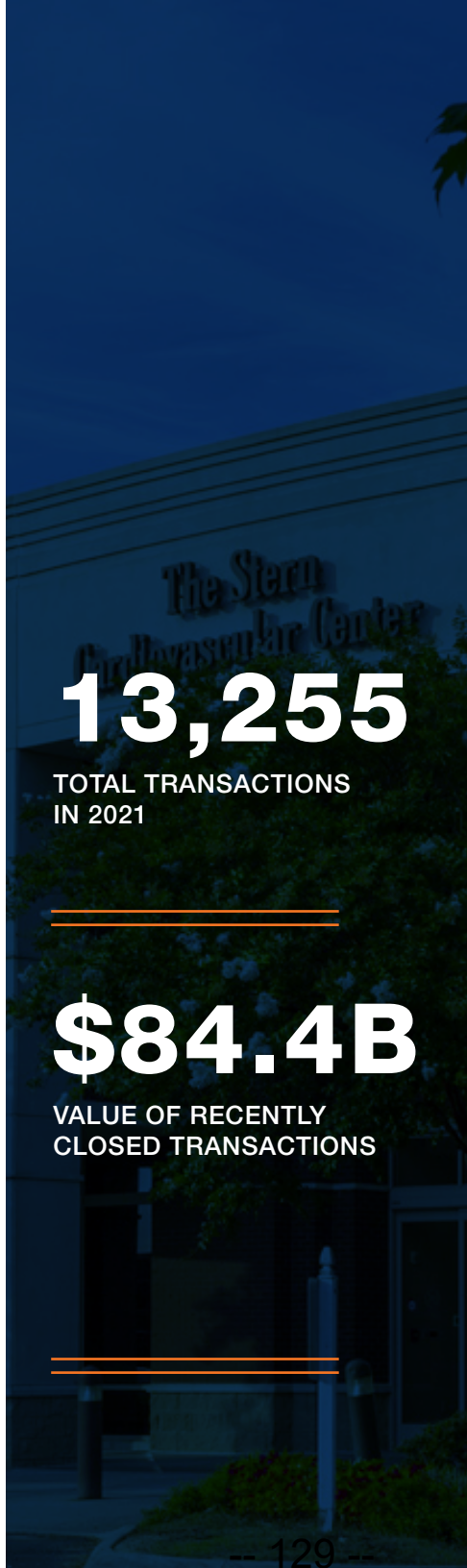
The success of Marcus & Millichap is based on our collaborative culture of information sharing across our network of more than 2,000 investment professionals, which maximizes value for each of our clients.

Working with a unique platform that is antithetical to the concept of “pocket listings,” our investment professionals share all listings with the entire Marcus & Millichap team. Each professional specializes in a property type and has a database of local properties and owners, which is leveraged in every client assignment. Because each local agent specializes in a single product type in a specific geographic region, our clients are completely covered across the U.S. and Canada with every investment.

Our foundation of information sharing maximizes pricing for our clients and gives us the largest inventory of any firm in the industry.

THE SIZE AND ACCESSIBILITY OF OUR INVENTORY ENABLES YOU TO SELL YOUR
PROPERTY AND QUICKLY MOVE INTO ANOTHER PROFITABLE INVESTMENT.

Marcus & Millichap



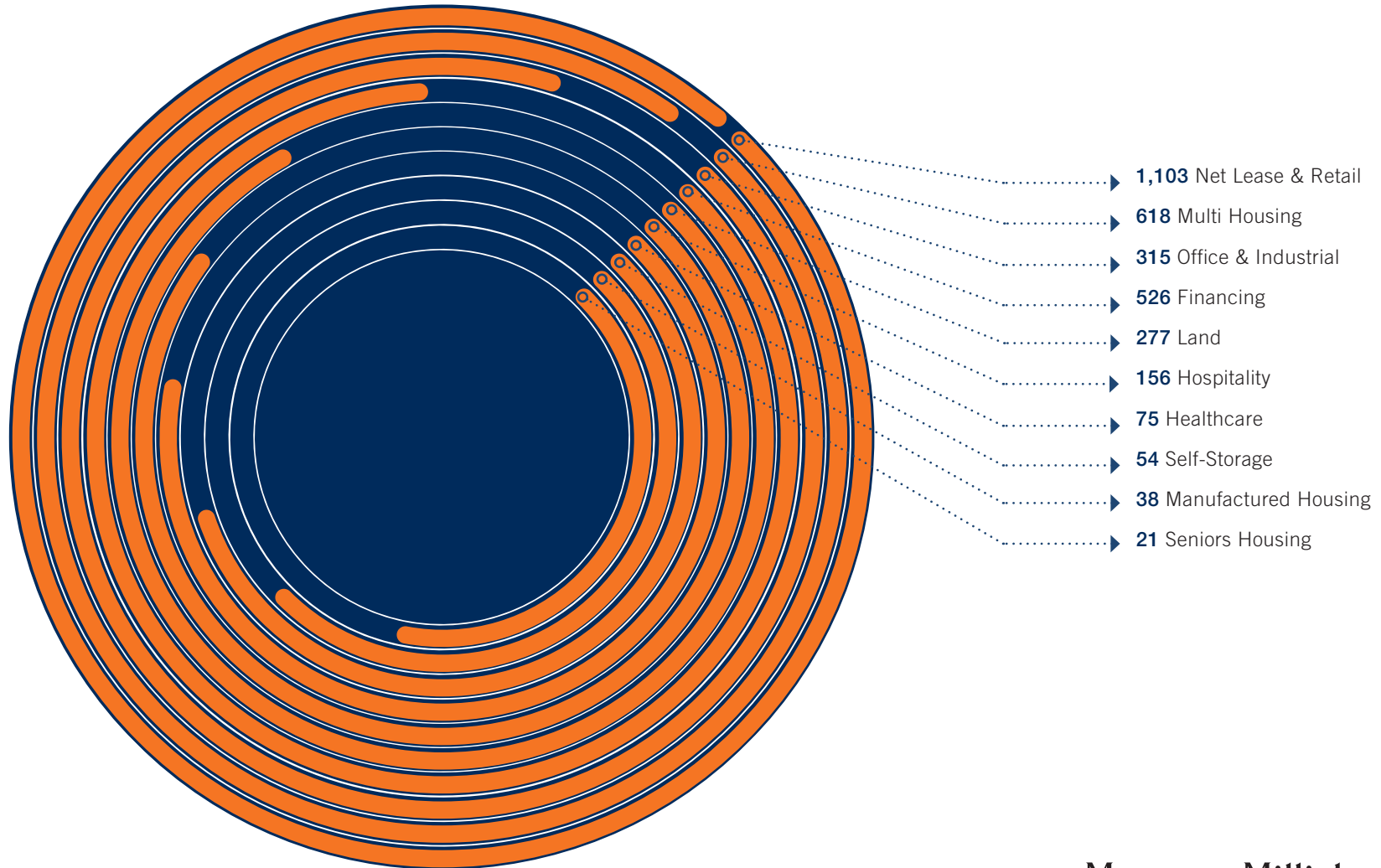
13,255

TOTAL TRANSACTIONS
IN 2021

\$84.4B

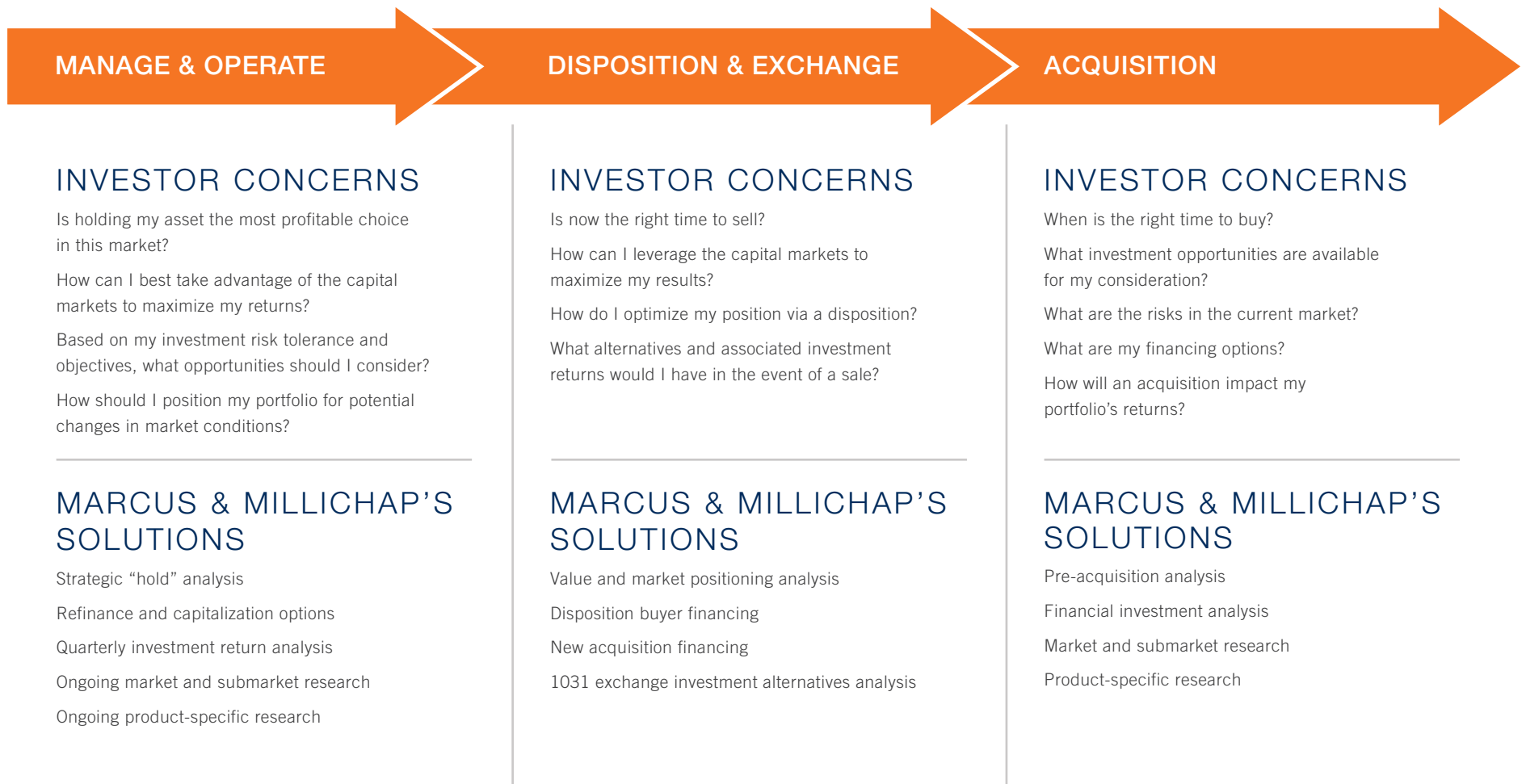
VALUE OF RECENTLY
CLOSED TRANSACTIONS

GAIN ACCESS TO THE NATION'S LARGEST EXCLUSIVE INVENTORY OF PROPERTIES FOR ALL PRODUCT TYPES



ADVISORY SERVICES ACROSS THE OWNERSHIP LIFECYCLE

Whether you're looking to buy, sell, refinance, or hold, Marcus & Millichap leverages real-time market research to assess local and national trends, with specialized focus on individual property types. Backed by the collaborative culture of industry experts, your local investment professional will walk you through each phase of your investment strategy.



December 20, 2022

Port of Astoria

Will Isom, Executive Director
422 Gateway Ave #100
Astoria, OR 97103

RE: Request for Proposals (RFP) For a Real Estate and Leasing Agent

Dear Mr. Isom and Selection Committee:

We thank you for the opportunity to present for the Real Estate and Leasing Agent for the Port of Astoria (the “Port”). In order to service the Port in the most holistic, comprehensive manner possible, Apex Real Estate Partners and Cushman & Wakefield have partnered together to provide the best-in-class service and expertise.

Apex and Cushman & Wakefield (the “Team”) are the two highest velocity commercial brokerage houses in the state of Oregon. The breadth and outreach of our companies encompass the Port of Astoria and extend throughout the state. Our partnership combines a comprehensive knowledge of the unique conditions required for government entities regarding budgeting, approval procedures, and funding challenges, to name a few. The formation of our Team, which is specifically catered to the Port, optimizes our combined ability to provide a complete spectrum of services. Our access to a wider array of resources and industry experience gives us a competitive advantage over other firms, making us a prime candidate for the aiding the Port in its real estate needs.

Disposition, acquisition, landlord leasing, tenant leasing, master planning, and ground up development are all within our scope of work with municipalities and counties. Our atypical collective breadth of in-house resources in our shops include legal counsel, construction management, space planning/programming, financial analysts, marketing, and research.

Essential to our decision-making process is the consideration of an equity lens during each stage of the real estate process. The purpose of the deployment of an equity lens is to be deliberately inclusive in our process and to support the Port as we strive towards more equitable outcomes and decisions. We are explicit in drawing attention to the inclusion of institutionally under-served and marginalized populations, with an emphasis on communities of color and an awareness for intersecting challenges and overlapping communities. The consideration of an equity lens will not tell us what action to take. Rather, it will facilitate discussion and reflection on equity considerations as we act and make decisions.

In addition, to ensure that we remain market leaders in sustainable management practices as a firm and for our clients, we abide by a comprehensive Global Corporate Responsibility Program. We integrate environmental, social, and governance (ESG) priorities into our corporate operations as our firms strive to make a positive impact on the environment, local communities, and the long-term value of their assets. Our environmental commitment includes focusing on energy and resource management, green leasing and sustainable site selection, corporate responsibility and reporting, legal and regulatory compliance, corporate occupancy, client services, procurement, and employee training. This is an important step as we continue to evolve and innovate in ways our stakeholders prioritize.

We support global efforts to mitigate the effects of climate change and strive to maintain the lowest possible levels of energy consumption and resulting greenhouse gas emissions (GHG) in our offices and activities. While our global footprint has grown as we have expanded our business internationally, we have significantly improved our energy and emissions efficiency through ongoing improvements in energy controls, installation of energy-efficient appliances, and employee education and behavioral change.

Sustainability, as defined across the three main pillars of economic, social, and environmental responsibility are at the core of our business operations.

Cushman & Wakefield is a leading global real estate services firm that delivers exceptional value by putting ideas into action for real estate occupiers and owners. Your points of contact will be Executive Managing Director Matt Johnson and Executive Managing Director Mark Carnese. Cushman & Wakefield is among the largest real estate services firms with 48,000 employees in approximately 400 offices and 70 countries. In 2017, the firm had revenue of \$6.9 billion across core services of property, facilities and project management, leasing, capital markets, advisory, and other services. Cushman & Wakefield has also implemented the Americas Diversity and Inclusion Council dedicated to developing strategies to recruit, develop, and retain diverse talent. Shawn Mobley, CEO of the Americas, leads the group and is expanding recruitment efforts for college level hires, promoting talent to leadership roles, and reporting metrics against the firm's goals.

Apex is the largest commercial real estate Minority-Owned Business licensed in the State of Oregon and Washington. Apex continually strives to improve the urban landscape in our real estate partnerships. We have been involved in the two largest "Net Zero" real estate development projects in North America: the Bullitt Center in Seattle, WA – the greenest commercial building in the world, and the PAE Living Building in Portland, OR – the largest mixed-use living building in the world. Apex also has a proven track record in working with many developers and tenants in achieving LEED Platinum, Gold, Silver, and other sustainability certifications.

Your points of contact at Apex will be Executive Director Nathan Sasaki, Director Irfan Tahir, Broker Wes Mallard, and Broker Ali Davis. We will also work as a team with our highly experienced and creative in-house support staff, including our industry research team, marketing director, financial analyst, client services coordinator, and transaction director to ensure a smooth and seamless transaction. In addition, we have a 100% open-resource policy, and every broker and support staff member is available to assist the Port with any requests.

Our approach is based on collaboration, cooperation, unique knowledge, and a national reach with a regional approach. We look forward to the opportunity to collaborate with the team at the Port of Astoria to achieve results that will exceed your expectations.

Sincerely,

Irfan Tahir
Director
Apex Real Estate Partners

Matt Johnson
Executive Managing Director
Cushman & Wakefield

Mark Carnese
Executive Managing Director
Cushman & Wakefield

Bruce Garlinghouse
Broker
Apex Real Estate Partners

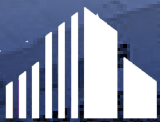
Wes Mallard
Broker
Apex Real Estate Partners

Cushman & Wakefield
200 SW Market St, Suite 200, Portland, OR 97201
503.279.1700 / www.cushmanwakefield.com

Apex Real Estate Partners
415 NW 11th Ave, Portland, OR 97209
503.595.2840 / www.apexcre.com



Request for Proposal For a Real Estate and Leasing Agent



CUSHMAN &
WAKEFIELD



APEX
REAL ESTATE PARTNERS

Section 1.a. Project Understanding

Thank you for the opportunity to participate in the Port of Astoria's RFP for a Real Estate and Leasing Agent. Real estate is local, and so is our team. The Oregon-based strategic alliance of Cushman & Wakefield (C&W) and Apex Real Estate Partners (Apex), your "Team," has a proven track record of helping public agencies, mission-driven organizations, and some of Oregon's largest companies with legacy real estate decisions.

Understanding of the Work

We believe this RFP provides the Port of Astoria ("Port") a unique opportunity to let Apex and C&W [*proactively represent the Port in sales and purchases of real property, and to act as a leasing agent in procuring and negotiating commercial leases on behalf of the Port.*](#) Our Team has extensive understanding and success with tenant and landlord lease representation, as well as the disposition and acquisition of land and buildings.

While much of this work is transactional, in order to achieve optimal results for the Port and your real estate portfolio, it has to be guided by strategy. We believe it is essential that our Team has an intricate knowledge of the Port's Real Estate Strategic Planning/Master Planning, and as a result gain fluency in:

- **The overarching real estate strategy to guide capital investment and maintenance going forward**
- **Thoroughly analyzing its portfolio to understand existing conditions and opportunities**
- **Potentially acquiring and disposing of certain assets**
- **Leasing vacancies**
- **Many other technical and strategic tasks to be identified collaboratively**

Our Team has successfully guided other public sector entities such as governmental and public agencies, non-profits, and regulated industries through a similar process to ensure all real estate decisions are evaluated through objective and transparent criteria. This approach results in optimal outcomes and long-term strategic solutions that use real estate as a tool not only to satisfy space needs, but to achieve multiple agency-wide objectives.

Public sector work is nuanced, and as a result requires a unique project approach in order to be successful. Our unparalleled experience providing real estate services to the public sector has given us a thorough understanding of the unique challenges that real estate presents for public agencies:

- **Need for flexibility to adapt to uncertainty and fluctuations in budget cycles**
- **The requirement to have a transparent and defensible process**
- **The need for detailed documentation and prudent decision making**
- **Additional reporting which can be required for board review, education, and approvals**
- **Strategies are vulnerable to political change and influence**
- **Property-rich, cash poor financial situation**
- **Need to engage stakeholders on highly technical and complex real estate issues**
- **Balancing a transparent public process with the confidentiality often needed in real estate negotiations**
- **Challenges with short term budget constraints and long-term needs**
- **Significant amount of workforce retiring and facing recruitment challenges**

Our combined holistic approach and transparent process enables our clients to make well-informed strategic decisions that are implementable and defensible at the board and stakeholder level. We provide optimal outcomes for our clients and ensure fiscal prudence while remaining cognizant of the regulatory environment, larger agency objectives, and additional pressures (unions, bonding capacity, public interest, boards, and funding sources).

We are strategic thinkers grounded in market realities, and bolstered by our combined resources and industry knowledge, we are confident in our ability to serve the needs of the Port of Astoria and our shared community.

Section 1.b. Familiarity with Commercial Real Estate Market & Industry

Our Team has a [deep understanding and familiarity with the commercial real estate market in Oregon and in Clatsop County in particular](#). Our collective teams have unparalleled experience working with the local and regional real estate market and public entities. Our Team of experts has unmatched experience working on high-profile assignments in the public sector and collaborating with mission-driven institutions. We develop proactive strategies that guide long-term decision-making, contributing to our excellent reputation in the real estate community and knowledge of the local market. Our Team stands out from our competitors for our hands-on decision making experience as project managers and team leads.

Our Team being Oregon based is what makes us uniquely qualified to assist the Port of Astoria with all of its real estate needs. Our brokers and staff live/work/play in Oregon. Unlike our competitors, our money remains in Oregon. We are invested in the success of our state and we know the market better than anyone.

We pride ourselves on our unparalleled commitment to our clients and the local economy. Our professionals are highly attuned to a real estate landscape that is continuously changing, and we are consistently praised for our thorough understanding of the local and regional market.

The following case studies showcase our expertise, skills, depth of knowledge in the industry.

Edlen & Co | Acquisition

- Our Team has partnered with Edlen & Co., a mission driven real estate investment and development firm that specializes in affordable housing and community services development, as well as Providence Health and Clatsop Behavioral Health to identify and acquire property in Clatsop County.
- Currently, Edlen & Co. and Clatsop Behavioral Health is under contract to acquire a property for a new behavioral health facility in Astoria that was identified by our Team off market.



NW Natural | Acquisition | Warrington

- Our Team supported NW Natural in site selection for a mission critical and fully resilient facility using objective criteria.
- We successfully identified a site, negotiated a very advantageous price and then closed on the property which met all of the identified criteria.
- The Public Utility Commission deemed it was a fiscally prudent decision by NW Natural, in part due to our throughout and transparent process.



NW Natural - Disposition | Astoria

- Once we closed on the site, our Team market the prior location for sale using our extensive database.
- We identified several interested parties, and selected the highest offer that provided the most certainty.
- We successfully closed on the transaction and were able to negotiate keeping the existing tower on site.



Citadel Apartments | Acquisition | Astoria

- Our Team, along with our partners acquired the 24 unit multi family project in February of 2022.
- We have begun cosmetic renovations to the units and exterior of the property.
- The property has averaged 95% occupancy during our period of ownership.
- We will be completing structural upgrades to the property in 2023.



The Drifhaven at Gearhart | Acquisition | Gearhart

- Our Team led a group of investors in the acquisition of a 12 room hotel in Gearhart Oregon.
- We completed a full renovation of the rooms and grounds over a three month period.
- The hotel has been re-branded to the Drifhaven Inn and recently received the 10.0 award from Hotels.com.
- We retained all of the staff from the prior ownership.
-

Shark Rock Commerce Center | Acquisition | Astoria

- Our Team led a group of investors in the acquisition of the Shark Rock Center in Downtown Astoria.
- We successfully negotiated a lease with Breaskside Brewery to open its first location on the Oregon Coast.
- The new tap room will be completed in the spring of 2023.



Our Team has active listings within Clatsop County.

- **Former US Bank Office / Retail | 408 Main Street, Tillamook | For Sale**

Section 1.c. Approach, Methods & Strategies

Our Team has a deep pool of resources locally and nationally that allows us to turn around the Port's requests in an expedited manner. Any issues or concerns that may arise will be solved diligently and professionally. We provide strategic expertise throughout every stage of implementation and maintain staffing capacity to serve the Port throughout the duration of the project. Our collaborative methods and additional resources include (but are not limited to) the following:

Valuation & Advisory: Government We conduct valuation and consultation services relating to federal, state, local, and tribal government entities. Studies and valuations are performed for acquisitions, pre-disposal redevelopment planning/positioning, and disposal of assets, land exchanges, and asset monitoring. Our team is experienced in preparing valuation assignments in compliance with the Uniform Appraisal Standards for Federal Land Acquisitions (Yellow Book Standards) and agency specific guidelines in addition to the Uniform Standards of Professional Appraisal Practice.

Lease Administration We offer a comprehensive "À La Carte" approach to lease administration services that provides consulting services, implementation services, ongoing management, and lease audit services. We recognize that effective and efficient management of real estate assets is nearly impossible without the right technology and data. Our platform systems include BIGCenter and Tririga, which provide ongoing lease administrative services.

Capital Markets We provides Capital Markets expertise throughout every stage of the acquisition and sales processes, helping clients finance, raise joint venture equity, and sell investment properties to meet strategic, operational, and financial goals for their real estate investments. Clients benefit from our global footprint and access to international capital, as well as local market expertise and experience of over 350 brokerage professionals in the Americas, bolstered by a national sales and finance platform that is in constant communication about trends and pricing. Services include investment sales and loan sale advisory, as well as equity, debt, and structured financing.

Financial Analysis We provide in-depth analyses on properties to compare leasing vs. owning, as well as qualitative and quantitative metrics between properties so that our clients can make the optimal choice when it comes to their real estate needs.

Transaction Management Transactions follow a structured and rigorous process with required documentation for every transaction. Our Team will utilize a proven and tailored transaction management process to achieve the Port's short and long term occupancy objectives.

Real Estate Financing We have a long and trusted partnership with Melvin Mark Capital Group (MM), a full service mortgage banking firm who originates and services commercial real estate loans through their extensive lender network that includes life insurance companies, banks, credit unions, agencies, CMBS and others. MM delivers tailor-made capital solutions to achieve investment strategies and provide competitive loan terms for our clients.

Research Cushman & Wakefield is a national leader in primary research and data-driven analysis. Our research professionals

work full time to track key statistics, vacancy rates, rental rates, operating expenses, absorption rates, and construction trends. The information is gathered, verified, and entered into a proprietary database, a system that tracks nearly 10 billion SF of office and industrial real estate nationwide.

Workplace Strategy Services We engage our clients' talent with workplace program development, design, and change management solutions to ensure implementation. This includes leveraging our Xperience per SF survey, analyzing over 100,000 datapoints from employees, managers, and leaders to understand how a flexible work environment and hybrid work can support an organization and their employees.

Sustainability & Wellness Advisory Group Wellness Advisory focuses on addressing wellness at the core of your business: company culture. Our ultimate goal is to incorporate Sustainability, WELL, and Fitwel services and to provide commercially focused sustainability advice that informs the real estate strategy. Our advice reduces cost, maximizes value, and supports delivery of your sustainability agenda.

Project and Development Services We have an in-house Project & Development Services (PDS) team that pursues the best solutions on behalf of our clients during the planning, development, and construction process. Our interdisciplinary team guides clients through the entire real estate decision making process, unearthing innovative facility solutions that are critical for productivity and success.

Real Estate Asset Strategies Large public and private organizations often own hundreds, if not thousands, of individual properties, yet often lack a strategic plan that ensures that these assets support the organization's core mission and goals. We work with public, private, and institutional organizations to analyze options and develop real estate strategies that enable them to create value, implement their core missions, attract and retain the best employees, and enhance the built environment.

- Portfolio Evaluation and Optimization
- Capital Investment Planning
- Disposition Strategies
- Lease vs. Own Analysis
- Strategic Planning and Visioning

Land Advisory Group Our Land Advisory Group serves institutional and private buyers and sellers of land. Our team is experienced with diverse land types including agricultural, energy, hospitality/resort, residential and commercial development, and natural resource. Our professionals offer a unique understanding of these properties, extending well beyond the physical attributes. Armed with extensive market-specific knowledge and regulatory and entitlement expertise, our professionals provide clients the tools they need to evaluate the highest and best use of their land assets.

Section 1.c. Approach, Methods & Strategies

Our Team's approach, methods and strategies are encompassed by equitable business practices. Along with our expertise, these practices are paramount to the success of our communities and are what set us apart from the competition. Our practices include (but are not limited to) the following:

DE&I Overview

We are committed to building a diverse and engaged workforce and supporting an inclusive environment where our employees can do their best work. Embracing new perspectives helps us solve problems, create opportunities, and develop new ideas. The rich tapestry of cultures, backgrounds, and experiences is an important part of our identity, and our Diversity, Equity & Inclusion (DE&I) efforts have received significant recognition as a result of our commitment. We are committed to DE&I for our companies, our clients, and the people who work in the properties we manage on clients' behalf.

Our Employees

Our goal through fostering our employees' training and development is not just to increase productivity at work, but to engage them in ways that acknowledge them as more than just a number in the organization. We reimburse costs to staff who wish to further their education in relation to their role.

We offer a full training program and host various workshops throughout the year to build awareness and understanding of appropriate inclusive behaviors, which we continue to expand.

We invest in workplace well-being to improve employee health, productivity, recruitment and retention, organizational culture, and employee morale.

Equitable Business Practices

Our Team embraces the values of diversity, equity, shared prosperity, and sustainability in authentic and meaningful ways. We look to create opportunity for minority professionals to gain experience and advance their career as exemplified by Bruce and Wes who will be shadowing Matt, Mark and Irfan in an effort to gain experience that will further advance their careers.

Apex is Oregon's only commercial real estate firm that is a certified Minority-Owned Business Enterprise (MBE), and we consider diversity to be of paramount importance and a foundational value. Cushman & Wakefield is not a certified MBE, WBE, SDVOB, but has a long history of engaging MBE and WBE firms as subcontractors and have built and maintained significant relationships with the leading M/WBE firms in our business. Additionally, we source products from certified M/WBE firms when competitive and track our spend per account to assist clients with their Tier I and Tier II accounting. Lastly, we have created an award-winning Veterans program to recruit, hire, and transition U.S. veterans into the civilian workforce.

Our Team is also committed to providing affordable real estate fees for local non-profits by reducing or waiving our fees as well as giving monetary donations to their causes.

Diversity

Our Team is committed to maintaining a workforce that is more diverse than our local population and to make the conscious effort to partner with minorities and minority run organizations.

We utilize Oregon's Certification Office for Business Inclusion and Diversity lists and NAMC Oregon vendor lists when looking for vendors to work with. Historically, the Commercial Real Estate (CRE) industry has been male-dominated with few opportunities for women and minorities. Although considerable efforts have been made industry-wide, there is still much work to be done to advance opportunities for diversity and equity in the commercial real estate workforce. At Apex, 40% of our team represents minorities and women. Apex has also received the Certification Office for Business Inclusion and Diversity (COBID) distinction through Business Oregon and holds an Equal Employment Opportunity (EEO) certification from the City of Portland.

Key DEI Accomplishments

Employee Resource Groups (ERGs) are employee-led groups that foster diverse and inclusive workplaces aligned with our organization's values, objectives, and business practices. ERGs enable colleagues with common interests or backgrounds to come together and offer one another support, information, and resources to ensure collective success. These groups can open new doors in all colleagues' careers—they're a critical part of our evolving commitment to diversity and inclusion.

Community Programs

We support organizations who have a clear focus on diversity, equity, and inclusion. Supplier Diversity is a business strategy that ensures a diverse supplier base in the procurement of goods and services. We are committed to diversifying our supply chain, and we approach our commitment as both a corporate social responsibility and a business driver that has a direct impact on our bottom line.

We are committed to supporting economic development and driving greater equity and inclusion in the communities we serve by putting into practice organizational efforts that create a more diverse and inclusive supply chain. We identify opportunities to engage and partner with diverse suppliers such as minority, women, veterans, LGBTQ+, and disability-certified businesses. Some of these classifications only apply to the U.S.; however, we are engaging with a diverse mix of suppliers globally. Our team is a member of the National Minority Supplier Development Council (NMSDC), the National LGBT Chamber of Commerce (NGLCC), the Women's Business Enterprise National Council (WBENC), WEConnect International, and United States Pan Asian Chamber of Commerce (USPAACC). These memberships allow us to utilize their knowledge, expertise and best practices to advance our Supplier Diversity Program and, in turn, we provide these organizations with our knowledge of the complexities and nuances that are unique to our industry.

Our organization engaged and partnered with one or more Nonprofit Organization, community-based organizations, racial equity advocacy organizations, educational institutions, and government agencies that serve and work closely with traditionally underrepresented or underserved populations.

Section 1.c. Acquisition - Approach, Methods & Strategies

Acquisition

Our acquisition experts will provide solutions for the Port that align real estate needs with your business strategy, financial goals, and operational objectives. We look beyond the immediate transaction to find a big picture solution, and we strive to transform real estate into an asset that houses your operations, attracts and retains top talent, and promotes creativity and collaboration. For every project, we provide exceptional levels of property due diligence, including physical inspections, buyer credit, character assessments, and market surveys and validations.

In every assignment, we leverage industry-leading research and cutting-edge technology to understand the market, uncover off-market opportunities, and develop innovative solutions. Our team's role is to understand which factors the Port considers essential and to facilitate large scale goals by implementing the following steps.

Below is an example of the process we will use for the Port which includes deliverables throughout the acquisition process. Please note that this process is fully customizable for the Port and can change based on your needs and feedback.

Task	Action Item	Deliverables
Discover	<ul style="list-style-type: none"> Define specialized expertise needed Assemble team & ascertain optimal solution Establish timing & leasing or purchase objectives 	<ul style="list-style-type: none"> Assemble project team Client needs assessment & confirmation
Envision	<p>Situational Analysis</p> <ul style="list-style-type: none"> Refine understanding of Port's real estate needs, Master Plan & financial requirements Prepare summary analysis & report <p>Strategy Development</p> <ul style="list-style-type: none"> Identify locations Prepare preliminary budgets & pricing Identify & analyze alternative transaction structures 	<ul style="list-style-type: none"> Survey & market assessment Project schedule Initial financial analysis Defined desired outcomes (Key objectives) Local market engagement strategy
Survey Market	<ul style="list-style-type: none"> Conduct comprehensive market survey to develop range of options Analyze prevailing market conditions & forecasts Match potential facilities with client's requirements 	<ul style="list-style-type: none"> Market survey book of alternative locations Market assessment & analysis Summary & fact sheet of alternatives
Analyze	<ul style="list-style-type: none"> Equity lens evaluation Market assessment Acquisition - Broker Opinion of Value (BOV) Assess risks & benefits of site(s) Determine: How well does the solution meet the criteria? 	<ul style="list-style-type: none"> Detailed criteria analysis for developing a range of options Financial analysis for valuation & cost of construction Location option analysis Site analysis & BOV report Site alternatives evaluation
Qualify & Select Alternatives	<p>Tour / Request for Proposal</p> <ul style="list-style-type: none"> Preview options Conduct tours of the most qualified options Prepare & issue Request for Proposal or Letter of Intent <p>Proposal Analysis</p> <ul style="list-style-type: none"> Evaluate proposals Present counter proposals Perform financial analysis and cost of construction 	<ul style="list-style-type: none"> Tour books Recommendations & alternatives Short list of alternatives, Letter of Intent Physical, qualitative & financial analyses between leasing, owning & other alternatives over periods of time such as 20 and 30 years Counter proposals & tracking matrix
Negotiation	<ul style="list-style-type: none"> Formulate negotiation strategies Make final recommendation on the best option that meets current and future needs & present to management Review deal terms & conditions with client Negotiate work letter Negotiate final lease agreement or Purchase & Sale Agreement 	<ul style="list-style-type: none"> Negotiate with property owners Lease document or Purchase & Sale Agreement with comments
Closing - Acquisition	<ul style="list-style-type: none"> Gather & track all due diligence materials Be available through Escrow and closing 	<ul style="list-style-type: none"> Escrow & documentation Mitigate any issues & resolve contingencies
On-going Services	<ul style="list-style-type: none"> Prepare transaction summary book & value-added summary Prepare critical date report Monitor critical dates & notify client 	<ul style="list-style-type: none"> Transaction summary book Critical date report Value-added summary

Section 1.c. Disposition & Landlord Leasing - Approach, Methods & Strategies

Disposition Process

When it is time to sell a property, we recommend orchestrating a controlled-bid sale process to apply a date-certain benchmark and compress the marketing period to create a sense of urgency among buyers. This approach also effectively communicates the Port's motivation. Before going to the market, we will likely conduct a Broker Opinion of Value (BOV) to assess the market conditions, followed by a pricing strategy and Offering Memorandum. This way, we can determine the best plan of action before marketing the site(s). Using our combined internal buyer database comprised of local and national investors, developers and owners/users, we will release the Offering Memorandum and Confidentiality Agreement to the market and contact buyers to promote the offering.

Landlord Leasing Process

When it comes to filling a vacancy in your property, our brokers are highly attuned to the real estate market. We track thousands of tenants both regionally and nationally, as well as their lease expirations, desired neighborhoods, required size range, and contact person. Our market knowledge allows us to fill vacancies ahead of schedule, requiring as little down time as possible.

Disposition & Landlord Leasing Marketing Strategy

We will work with the Port to create a disposition/leasing timeline and marketing strategy that allows us to approach the marketplace most effectively. Our Team will develop an attractively organized and informative marketing package to broadcast in every market segment. Along with providing marketing materials for the property with a specific focus on the appropriate user groups, we will also confirm the most likely buyer/tenant for the property. The key to successfully marketing the property is to reach the most qualified buyers/tenants with comprehensive market exposure through multiple channels.

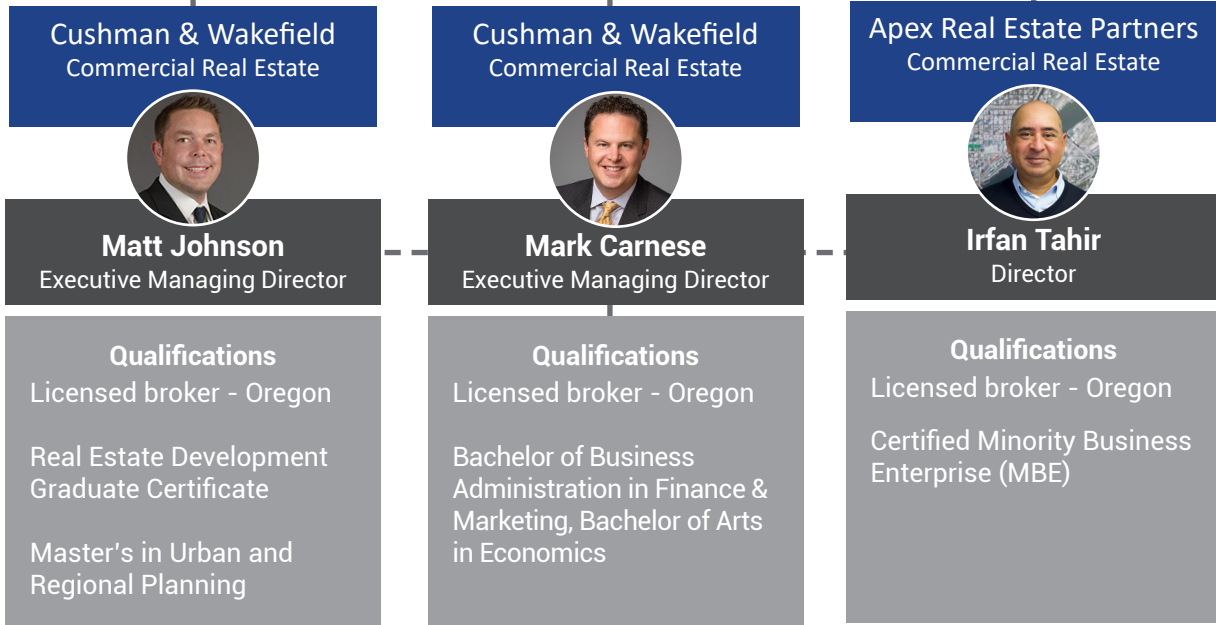
We will release the marketing materials to the market using our combined internal buyer/tenant database comprised of local and national investors, developers, owner/users, brokers, and tenants. Additionally, we will contact prospects to promote the property, advertise, place signage, host virtual tours including Matterport tours, compile photo galleries, obtain drone footage, and create promotional videos.

As groups express interest, our Team will work to determine a recommended buyer/tenant (with alternative options) and will carry out the negotiation process through escrow or tenant move. This process is highly documented and detailed for ongoing reporting and review by regulatory agencies and the public. Our methodical and multi-pronged marketing strategy to capture the attention of the target buyers/tenants is as follows:

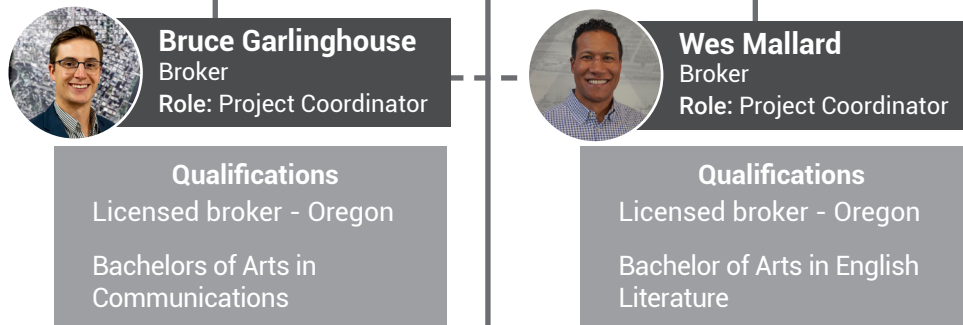
Doing the "homework" Pre-Marketing	Hit the Ground Running Marketing Launch	Engage the Market Marketing Campaign	As Offers Received Negotiations	Delivering the Promise Closing
<ul style="list-style-type: none"> Assign scope confirmation Establish objectives & start project Execute Listing Agreement Tour property Property recommendations Market assessment Complete competitive analysis Compile due diligence Review building plans Create property description & focus on unique positioning Compile targeted prospects Financial analysis Operating expense analysis Create property collateral Develop Owner/Landlord preferred reporting system Schedule reporting calls/meetings Alternatives & recommendations, including financial comparisons between leasing, owning & other alternatives over periods of time such as 20 & 30 years 	<ul style="list-style-type: none"> Finalize project branding Create detailed mailing package Begin phone campaign Contact targeted prospects Leverage buyer/tenant database Begin email campaigns Begin Targeted Geographic Mailers Alert top brokers Email broker blasts Broker calls & cooperation Circulate to internal brokerage houses 	<ul style="list-style-type: none"> Ongoing investor/tenant outreach Property tours Review concerns after tours Continue follow-up Phone calls with prospects Track competition Detailed investor/tenant reporting 	<p>Disposition</p> <ul style="list-style-type: none"> Set offer date Receive offers Summarize & submit offer matrix Negotiate LOI terms internally with prospective buyers Push pricing Assess potential buyer's financial capability Execute Final LOI Draft PSA (Purchase & Sale Agreement), review for accuracy Final recommendations Finalize PSA Respond to any issues that arise during due diligence <p>Landlord Leasing</p> <ul style="list-style-type: none"> Respond/review to Request for Proposals Provide recommendations (rate, TIA, space plan, concessions) Negotiate prospective tenants Assess potential tenant's financial capability Final recommendations Execute Master Lease 	<p>Disposition</p> <ul style="list-style-type: none"> Due diligence complete Escrow & documentation Earnest money to go to nonrefundable Title company closes escrow Seller receives proceeds Buyer assumes title <p>Landlord Leasing</p> <ul style="list-style-type: none"> Finalize space plan Complete tenant improvements



Strategic Partners



Lead Coordinators



Support



Section 1.f. Acquisition / Disposition Experience

Our Team has [*extensive experience and success in completing purchases and sales of commercial properties on behalf of public entities in Oregon*](#) as demonstrated in the following transactions completed in the past 5 years.

Port of Portland / Prosper Portland (formerly Portland Development Commission) [Public Entity](#)
Master Planning / Site Evaluation / Acquisition Negotiation / Disposition / Development / Leasing
Contact Port of Portland | Joe Mollusky | 1.800.547.8411 or 503.415.6000
Prosper Portland | Bruce Allen | 503.823.3200



Cascade Station is a vibrant mixed-use development at the “gateway” to Portland International Airport (PDX), The 120-acre site yields 800,000 SF of retail space, 1.2 million SF of office space and 250 hotel rooms, and is one of Portland’s premier retail destinations.

In representing the Port of Portland and Prosper Portland we have worked on the development of the Cascade Station from master planning through disposition and development. Over the course of the last 14 years we have worked on the development of 3 phases of the Port of Portland and Prosper Portland’s master plan for the station and surrounding areas. Since 2005 our involvement has included contribution to the master planning, acquisition of strategic properties, disposition, development, and leasing.

State of Oregon - DAS Wilsonville [Public Entity](#)
Wilsonville | 185,000 SF | Site Evaluation / Acquisition Negotiation
Contact Liz Beaty | 503.510.1705 | liz.beaty@das.oregon.gov



Our team was retained to help the State evaluate a potential acquisition of lease of a critical facility for the State, to include office, storage and lab space. Working through an analysis with the State it was determined that owning was a preferred strategy given the use of the building and penitential uses. Additionally, the building had to be seismically resilient so that if a major event were to occur the building could support the State in responding. We identified a building that met the criteria of the State, from both a location, and use standard. We developed a negotiation strategy and acquired the building, which is located in Wilsonville, for the State. We bought the building for a market price; however, were able to include in the purchase price (without paying more for) significant improvements to the building and lab space (estimated at over \$20M), free furniture and the installation of an elevator to make the building ADA compliant. Currently the building is being used to store PP&E as the State responds to the COVID-19 pandemic, and our team is engaged on two additional projects to expand the State’s emergency response ability.

Our team, working with the Department of State Lands, negotiated the sale of 778 acres in Bend, Oregon. We utilized our extensive database and deep network of relationships to identify multiple potential buyers. We qualified the buyers based on ability to close and term, and successfully negotiated an extremely fast close with the highest bidder.

Our team was engaged to help DAS acquire a warehouse or land to build a warehouse that would serve as a critical response structure for the State of Oregon. We identified several buildings and land in the area which could accommodate the need. After an evaluation of costs it would take to improve existing structure or do a build-to-suit it was determined a build-to-suit was the most cost effective solution. We acquired the land at advantageous terms for the State.

Citycounty Insurance Services (CIS) [Public Entity](#)
Tigard / Tualatin | Disposition / Portfolio Management
Contact Patrick Priest | 503.954.9431 | ppriest@cisoregon.org



CIS is an insurance organization insuring the various Cities and Counties in the area. At the time, they had split operations between Salem and Tigard, Oregon, with both buildings being purchased and renovated for their use. The goal was to sell both buildings and look for a more central, single location to accommodate their future needs. The priority was to move their equity into a new owned facility.

Our Team was first tasked to value the owned assets through a BOV process and then provide for estimated occupancy costs for the future home. This information was all reported back to the Board of Directors to validate if there was a viable project at hand and if the organization wanted to execute on our strategy. Ultimately our Team successfully sold both buildings with closing dates closely aligned, identified an ideal land site for a building to suite buildings and relocated the organization to temporary facilities while the process of a build-to-suit was completed.

TriMet Bus Layover Friendly Condemnation [Public Entity](#)
Portland Metropolitan Area
Contact Lance Erz | 503.962.2108 | erzl@trimet.org



Our Team has been engaged with TriMet on disposition and acquisition advisory for their portfolio, successfully disposing of excess land for a mixed-use development and currently under contract with another property to develop into affordable housing units. For acquisition, we represented TriMet on a facility to accommodate bus storage.

After an exhaustive market search, no availabilities were viable, but our Team was able to identify a site that met TriMet’s criteria (even though it was not listed for sale). After making an unsolicited offer to the owner for \$24,810,000 at market value, ownership declined. Nonetheless, we were able to facilitate TriMet acquiring the site through a friendly condemnation.

Section 1.f. Landlord Leasing Experience

Our Team has [*extensive experience and success in landlord representation with locating prospective lessees and negotiating commercial leases*](#) as demonstrated in the following transactions completed in the past 5 years.

Landlord Partner with 3S Development

State of Oregon [*Public Entity*](#)

673 Market St, Medford | 688 Market St, Medford | 725 W Main St, John Day | 6035 NE 78th Ct, Portland

Contact: David Schaffer | dschaffer@melvinmarkcapital.com | 503.314.2541

Scope of Work

Our Team successfully partnered with 3S Development in the acquisition, project management and leasing of multiple office buildings for the State of Oregon. The very first project started in 2015 and continues to this day. The portfolio consists of four buildings totaling approximately 80,000 RSF. Our Team is responsible for the financial analysis, operating expense budget review, construction cost oversight, leasing and lease negotiations for the portfolio. Our staff supports all project team members during the lease up process and continue with assisting in reviewing operating expense budgets including capital improvement strategies.

Successful Landlord Relationship

Apex's Nathan Sasaki is a principal of 3S Development. So, our clients get the advantage of an experienced leasing team and an experienced partner with a strong understanding of the details of building ownership. Our Landlord partners benefit from this perspective and experience.

Results

During a time when most landlord's are experiencing significant vacancy our team has delivered for 3S Development. All the buildings are 100% occupied with the State of Oregon and the GSA.

PAE Living Building | The largest commercial building in the world built to achieve full Living Building Challenge (LBC) certification from the Seattle-based International Living Future Institute (ILFI)

SW 1st Ave & SW Pine St, Portland

Contact: Paul Schwer | paul.schwer@pae-engineers.com | 503.226.2921

We teamed up with PAE Consulting Engineers, Walsh Construction, ZGF Architects and Gerding Edlen Development to build Portland's first certified Living Building and the most sustainable mixed-use building in the world. This project seeks to achieve the highest levels of building performance and sustainability based on modern design and construction methodologies while thoughtfully incorporating characteristics of the Skidmore Old Town Historic District.

Challenges & Results

Apex assisted with locating a site that was positioned in the correct location for solar, power grid access, natural light, and in an area that is height restricted with a lower base floor area ratio. We evaluated the financial feasibility of a Living Building with base building costs higher than most standard office buildings. With this, Apex provided market leading analysis on land sales, lease comps, and tenant specific tax incentives.

Apex provided guidance on the building design and layout of common area elements for future leasing as well as offered direction on base floor plan construction to maximize lender and investor valuation.

Oregon Health & Sciences University (OHSU)

Multiple Projects, Portland Metropolitan Area

Contact: Greg Gonzalez | 503.577.1792 | gonzalgr@ohsu.edu

Our Team is currently collaborating to represent Oregon Health Sciences University with all it's real estate needs. As one of the five largest tenants in the Portland market (in addition to occupancy of owned space) makes OHSU one of the largest non governmental footprints in the market. The scope of work includes landlord representation on the leasing or subleasing of space, tenant representation, council for acquisitions/dispositions as well as short term/long term planning. With over 60 properties/locations the oversight of the account involves every component of real estate. Our scope of work including negotiations of leases and subleases both on the landlord as well as tenant side, short and long term strategizing involving acquisition as well as disposition planning as well as assembly/partnership plays.

General Services Administration (GSA) [*Public Entity*](#)

Multiple Projects, Portland Metropolitan Area, Washington & Idaho

Contact: Confidential

Our Team has represented approximately 15 federal GSA transactions in the Pacific Northwest. This includes Oregon, Washington and Idaho. The services provided have been for numerous agencies, including the Bureau of Land Management, Forest Service, Social Security, Environmental Protection Agency, Federal Bureau of Investigations, etc.

The project entails transaction management services, which includes identifying agency requirements, determining the competitive landscape prior to engaging the market, reviewing potential alternatives, including existing buildings and land for BTS and engaging the Landlords in a competitive procurement.

Section 2. Compensation Terms

Our Team has included a commission schedule which would be associated with transactions of real estate on behalf of the Port.

Compensation is transactional based. Disposition fees are paid by Seller, Acquisition fees are paid by Seller, Landlord fees paid by Owner/Landlord, Tenant Leasing fees are also paid by the Owner/Landlord.

Our Team does not require or expect any expenses to be reimbursed by the Port.

Commission-based categories

- Leasing as an Owner's Representative and Tenant's Representative.
- Disposition of Land and/or Buildings.
- Acquisition of Land and/or Buildings

Commission-based guidelines

If the property, for sale or lease, is owned by the Port, then the Port will be responsible for paying commission and varies on the subject property.

Real property disposition. For the sale of any real property, the Port shall pay at closing as follows:

Sale price	Commission
• \$1 - \$499,999	6%
• \$500,000 - \$1,499,999	5%
• \$1,500,000 - \$2,499,999	4%
• \$2,500,000 - \$19,999,999	3%
• \$20,000,000 and above	2%

This structure provides for full market compensation on small projects while acknowledging the economies of scale created by large projects. In the event that the buyer was represented by a real estate broker, they would be entitled to half of the above fee.

Acquisition Transactions

- For the purchase of any real property, commission fees will be paid by the Seller.
- The Port will not agree to enter into a purchase agreement without the Contractor being paid a fee by the seller equal to at least half of the fee structure above for the sale of real property.
- If property being acquired is off market and the seller has no representation we would utilize the disposition schedule to determine fees the Port would be incurring.

Lease and Sublease assignments

- Contractor shall be paid 6% of the total lease consideration if the lessee is represented by a real estate broker and 4% if the lessee is not represented.
- If the lessee is represented the fee would be split 2/3rds to the lessee's representative and 1/3rd to Contractor.
- Said fees shall be paid fifty (50%) percent upon lease execution and fifty (50%) percent upon commencement of the lease.

Buy-out negotiations

Contractor shall be paid 5% of the total rental payment savings, less buyout costs if the lease is terminated.

Lease Renewals/Restructuring

This fee will be paid by the landlord (If Landlord is the Port).

The fee paid by a landlord is

- 2.5% of years 1-5
- 1.5% of years 6 – 10