



Construction Management Services Proposal

Project:

Silicon Valley Bank
181 Bay St., Toronto, ON M5J 2S1

Submitted to:

Cresa Toronto Inc., Brokerage
170 University Avenue, Suite
1100
Toronto, ON M5H 3B3

Attention:

George N. Cescon, PMP, FMP
E: gcescon@cresa.com

January 7, 2022

Cover Letter

Silicon Valley Bank

Attention: George N. Cescon, PMP, FMP

E-mail: gcescon@cresa.com

RE: Silicon Valley Bank – 181 Bay St. 42nd floor

Please find enclosed our Construction Management submission in response to your RFP. The proposal submission outlines Flat Iron's pledge to deliver a transparent, diverse, and inclusive building partnership with Cresa and Silicon Valley Bank. If you'd like us to provide you with additional information, please let us know.

Why Choose Flat Iron?

1) Experience: We build about 1M SF of space annually. The team we have proposed for this project are focused exclusively on workplace mandates ranging in size from 5K to 40K SF in scope.

2) Core Values: Flat Iron is not your typical constructor. Our employees are focused on building forward together with purpose and embody our core values:

- **Bold** – Have courage to do what is right, not what is easy. Provoke people to reject complacency. Always ask is there a better way?
- **Open** – Be considerate of all perspectives. Be willing to take a novel viewpoint seriously. Be transparent, honest and vulnerable in approach.
- **Team** – Foster diversity in perspective. Be consistent in attention to results. Always influence for the better.

We have reviewed the floorplans provided and confirm that we have assisted on many similar mandates in recent years. Along the way, we have also accumulated an extensive trade database and our trade relationships run very deep. However, we are always looking to bring new fresh thinkers to the market providing the best value for our clients. Flat Iron's goal is to provide price and schedule certainty for Silicon Valley Bank in pre-construction and take the worry out of the construction phase of the project. We do this by providing transparency throughout the entire process using our cloud-based software – Procore. We are excited about this project for Silicon Valley Bank and look forward to the possibility of working with this team in the near future!

Yours truly,

FLAT IRON BUILDING GROUP INC.



Julie Phillips

Partner + President

jphillips@flatiron.ca

416.705.8543

1 Company Background and Project Approach

COMPANY BACKGROUND

Every day we strive to be the best building partner in the country. We believe that a projects' success is determined in pre-construction. We dedicate unlimited resources in planning and consideration during the design process to ensure seamless execution in construction. As a Construction Management Partner, our job is to save every client time and money, while not sacrificing quality. Our clients will attest to how our consultant team works collaboratively with you to achieve more value for each project.

At Flat Iron, we pride ourselves on not being your typical construction partner. We are comprised of a diverse team of innovators, collaborators, and building partners. We all have the same goal in mind of cultivating a new standard in the built environment. We embrace the collaborative spirit at every turn. Diverse perspectives help us find the best solutions and create inclusive and welcoming spaces.

All our employees embody our 3 core values.

- 1. Be Bold** - Be brave to do what is right, not what is easy. Encourage people to avoid complacency. Always ask, "is there a better way?"
- 2. Be Open** - Be considerate of all perspectives. Be willing to seriously consider novel viewpoints. Be transparent, honest, and collaborative in our approach.
- 3. Create Community** - Create a diverse and inclusive environment in our approach and actions. Communicate to unite the team. Build to be better.

Any construction project involves many stakeholders and many decision-making points. At Flat Iron, we achieve our vision through our People, our Systems, and our Technology.



PEOPLE

We select a unique team for each project depending on its nature and complexity. We always look to put a team together that has "done it before." Every project has unique challenges and we examine those in selecting the right team to deliver. We have a total staff of 48 experienced and dedicated professionals ready to build your project.



SYSTEMS

Our goal is consistency every time. When you hire Flat Iron, you can expect a consistent approach from the day we are awarded the job until we complete the close-out. Our delivery ensures all details are considered, documented, measured, and monitored throughout the project's construction so that issues/challenges can be flagged and resolved proactively.



TECHNOLOGY

Fundamental to Flat Iron's ability to communicate, is the use of state-of-the-art construction software – Procore. Procore is a web-based construction management program that increases efficiency and accountability by providing streamlined project communication and documentation. Procore allows entire team collaboration on documents, submittals, RFIs, changes, contracts, schedules, drawings, and deficiencies.

Our goal is to be the best construction partner in the country. We approach every project with the same consistent process, and a consistent approach yields consistent results. The next page outlines our overall process.



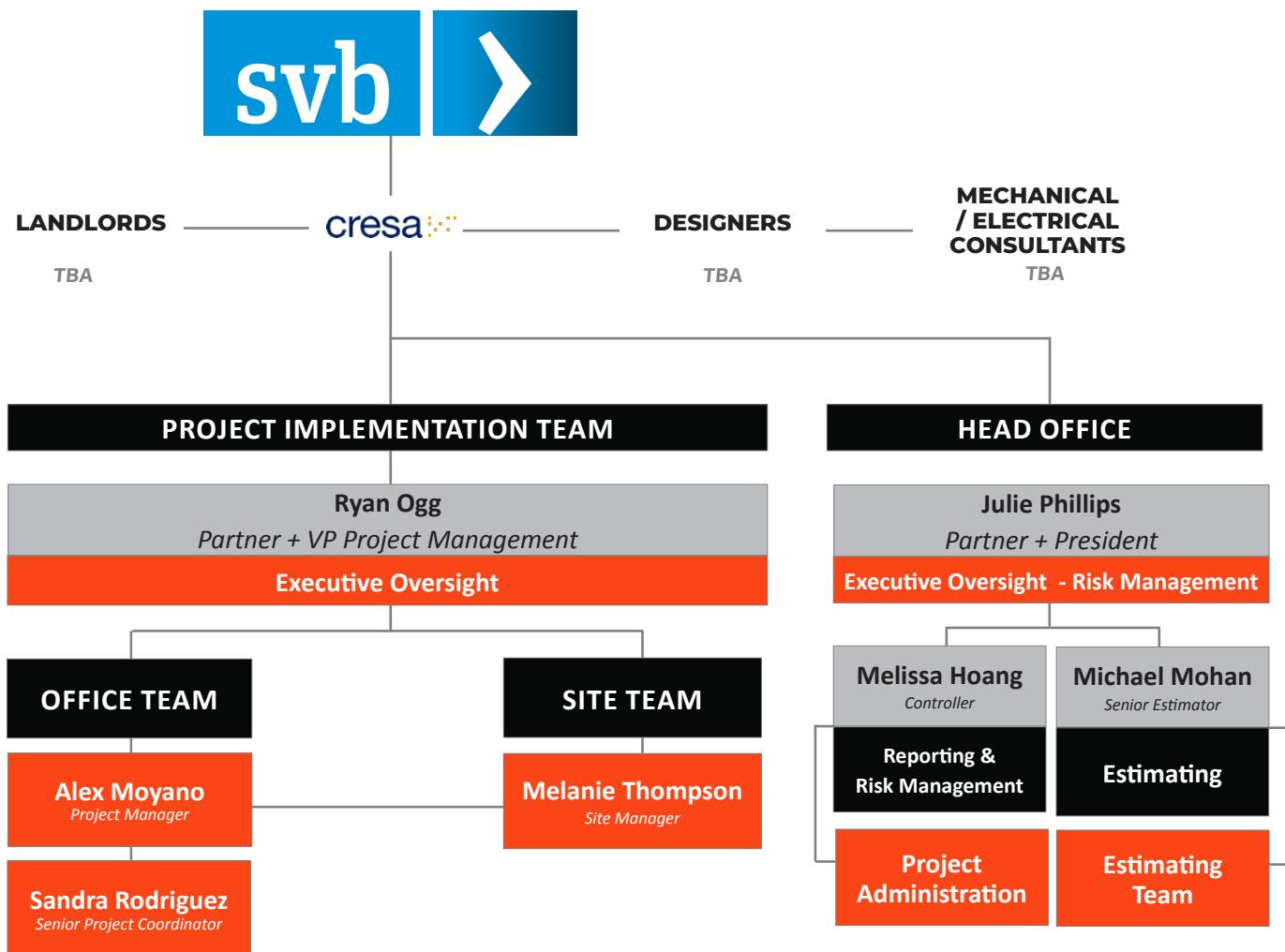
2 Organization and Staffing

Flat Iron selects a unique team for each project depending on the nature and complexity of that project. We always look to put a team together that has “done it before.” Every project has unique complexities, and we examine those in selecting the right team to deliver on each project. We have a total staff compliment of 48 experienced and dedicated professionals ready to give your project their attention.

A summary of our team and their roles and current commitments is on the following pages, with detailed resumes included in Appendix B.

A full company organization chart is also included in Appendix E.

PROJECT TEAM ORGANIZATION



B Detailed Resumes





RYAN OGG

PROJECT DIRECTOR/ EXECUTIVE OVERSIGHT

Ryan will have ultimate responsibility for the project team during pre-construction, construction and post-construction, keeping our team on track starting with a Partnering session. He is especially involved in the pre-construction, ensuring client requirements are met. He is also the point of escalation for the client throughout the duration of the project.

QUALIFICATIONS & RESPONSIBILITIES

Ryan leads all high profile mandates and the project management group while focusing on delivering success for all of Flat Iron's clients. With over 19 years of commercial project experience, he is focused on distilling his experiences to our Project Management team and builds upon the firm's already high standards for preconstruction work. His Project Management experience to date includes the overall start-to-finish management of complex projects, from 15,000 SF to 200,000 SF.

Ryan has ultimate responsibility for his project team throughout but he is especially involved in the pre-construction, ensuring client requirements are met. He is also the first point of escalation for the client throughout the duration of the project.

Pre-Construction: Ryan will be involved in the design stages, starting with a Partnering meeting with the client, client representatives and our Design-Build consultant team. He will establish lines of communication and client terms of logistics, deadlines, and documentation. He will complete design document reviews to ensure there are no omissions and those building considerations are fully reviewed prior to tender. He is the quarterback of the team, ensuring regular schedules and budgets will be issued in a timely manner and that key approval dates and milestones are met throughout pre-construction.

Construction: Ryan has the ultimate responsibility for the project team, ensuring all aspects of the project are coordinated seamlessly. He will manage all communication with all project team members.

Post Construction: Ryan is charged with ensuring that all projects within 15 days and actively sees each project through to completion.

YEARS OF EXPERIENCE

NINETEEN

EDUCATION / TRAINING

Construction Engineering
Management, George Brown
College

Training:

Procore Certified

First Aid - Level C CPR / AED

Fire Extinguisher

Asbestos Safety Awareness

Fall Protection

WHMIS

Occupational Health & Safety
Act & Construction Regulations
Program

PROJECT AVAILABILITY

50% (PRECON)

20% (CONST. TO CLOSE)



SELECTED RELEVANT PROJECTS

Mirvish Village Market for Westbank Corp. – 25,000 SF

581 Boor St. W., Toronto, ON

Project scope includes the fit-out of the east and west mixed use public markets with 16 prepared food vendors/stalls (vendor fit-out-ready), communication stairs b and j, a bar & event space with a live music stage and exterior signage along Honest Ed's Alley.

Young People's Theatre Renovations - 14,500 SF

161 Frederick St. & 165 Front St. E., Toronto, ON

Renovations to Administrative support spaces at 161 & improvements to lobbies at a heritage-designated building at 165 Front, including mainstage & studio theatre and support areas.

MaRS - Waterfront Innovation Centre (WIC) - 55,000 SF

125-155 Queens Quay West (The Hive Building),
Floors 2 and 3, Toronto, ON

Fit-out of a new space with a mixture of office/meeting rooms, coworking, open and collaborative areas and reception. HVAC distribution is underfloor and ceilings are open to slab.

Navacord Insurance & Risk Management - Fit-out - 10,000 SF

Commerce Court West, 199 Bay St., Suite 4100,
Toronto, ON

Demolition of existing space, and re-fit-out, reusing some existing infrastructure.

First National - 130,500 SF

16 York Street, Floors 17, 18, 19, 20 and 21, Toronto,
ON

New building tenant fit-out featuring raised floor system.

Investment Management Corporation of Ontario (IMCO) - 66,000 SF

16 York Street, Floors 23, 24 & 25, Toronto, ON

Renovation and fit-up on 3 floors in a newly constructed building in base building condition.

Transcat Canada - 17,000 SF

1435 Norjon Court, Units 8 & 9, Burlington, ON
3/4 light industrial + 1/4 office space Includes General Lab, Dimensional Lab, Spectrum Lab, CMM Lab, open and closed offices areas, open collaboration areas.

Spin Master - 110,000 SF

Interconnecting stair, high-end custom finishes, theatre, video studio, compressed schedule.



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Sanofi Pasteur - 23,000 SF

North York, ON

Ground-up re-building of Bio level 3 lab for the production of the Polio vaccine.

Dundee Wealth Management - 200,000 SF

12 floors, including inter-connecting staircase, completed on a compressed schedule

Goodmans LLP - 170,000 SF

7 floors, with inter-connecting staircase and a high-end conference floor

Buckhorn: Creekside Cafe-2,000 SF

1875 Buckhorn Road, Mississauga, ON

Fit-out of Cafe on ground floor

CRC Research - 10,000 SF

121 Bloor St. East., Toronto, ON

Full tenant fit-out in an already back-to-base space.

Mitel Telecommunications -

10,300 SF

105 Commerce Valley Drive West, Suite 300, Markham, ON

Full tenant fit-out

ARC Productions - 50,000 SF

Spin Master - 110,000 SF

Interconnecting stair, high-end custom finishes, theatre, video studio, compressed schedule

Uber - 80,000 SF

Refresh of existing staircase, compressed schedule, catering kitchen, design build millwork package, upgraded exterior patio

McCarthy Tetrault LLP - 225,000 SF

10 floors, high end conference floor, complete with sky fold partitions

Dundee Corporation - 30,000 SF

Features high-end finishes and an inter-connecting staircase

Infusion/Avanade - 30,000 SF

Features inter-connecting stairs

Sherritt International - 24,000 SF

Dundee Global - 22,000 SF

High-end finishes, multi-phased schedule as it was built in an occupied space

Scalar Decisions - 20,000 SF

high-security SOC built, compressed schedule

TTC - 66,000 SF

Compressed schedule, all office fronts had to be pre-ordered, prior to drywall installation.

Manulife - 30,000 SF

Uber Technologies Inc. - 78,000 SF

Spin Master - 7th Floor - 20,000 SF

Sound and editing studio

Almag Aluminum - 15,000 SF

Exterior building refresh and additional 2nd Floor mezzanine

Facebook - 17,000 SF

Worked within occupied environment, catering kitchen

Vector Institute - 30,000 SF

AI space, turn-key build for landlord, compressed schedule

Booking.com - 50,000 SF

Custom millwork package, call centre

Bereskin & Parr LLP - 40,000 SF

Occupied space, high-end client facing meeting and conference rooms

Sealed Air - Ground-up Build - 50,000 SF

3755 Laird Dr., Mississauga, ON

A new-build consisting of 20% Office + 70% Warehouse. 1 Storey unit, slab-on-grade, added wash bays, wire mesh cage, lockable areas and designated chemical and testing area for cleaning equipment. Completed in 9 weeks.



ALEX MOYANO

PROJECT MANAGER

Support the Estimating Team in Pre-construction with schedule and budget revisions. Responsible during construction to ensure communication and schedule + budget achieved.

QUALIFICATIONS & RESPONSIBILITIES

Alex has 7 years of experience in commercial interior fit-outs. He began his career as a Project Coordinator immediately upon graduating with a Construction Engineering Technology Diploma from George Brown College in 2014, Alex was effective at contributing to the success of 4 significant projects valued between \$2.5 million to \$23 million. This experience lead him to join Flat Iron in 2020 as Project Manager where he has been instrumental in a variety of interior renovation/retrofit projects. He is knowledgeable of the process, he is also thorough and consistent in his approach to project management which is appreciated by our clients.

Pre-Construction: Alex will be completely focused during the pre-construction phase of the project, in terms of logistics, deadlines and documentation. He will complete drawing review collectively with the executive team to ensure that there are no omissions and that building requirements are fully considered prior to tender. He is the quarterback of the team, ensuring that timely schedules and budgets are issued, and key approval dates and milestones are met throughout this phase.

Construction: Alex has ultimate responsibility for the project and ensuring all aspects of the project are coordinated seamlessly. He will attend construction meetings and manage all communication to all project team members.

Post Construction: Projects are only as good as they finish. Our project management team is charged with proactively managing all deficiencies. Alex is charged with closing all projects within 15 days and stays active in managing the project through to completion.

YEARS OF EXPERIENCE

SEVEN

EDUCATION

Construction Engineering Technology Diploma,
George Brown College

TRAINING / CERTIFICATIONS

309A Electrical License - Level 1, Humber College

Procore Certified

WHMIS Certified

PROJECT AVAILABILITY

25% (PRECON)
50% (CONST TO CLOSE)



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161 Frederick St. & 165 Front St. E., Toronto, ON

Renovations to Administrative support spaces at 161 & improvements to lobbies at a heritage-designated building at 165 Front, including mainstage & studio theatre and support areas.

Echelon Relocation - 6,000 SF

1565 Carling Ave., Suite 600, Ottawa, ON

Interior renovation of existing office space.

Registered Nurses Association of Ontario (RNAO)–30,000 SF

Suite 500 - 4211 Yonge St., Toronto, ON

Renovation and interior fit-out

Transcat Canada - 17,000 SF

1435 Norjon Court, Units 8 & 9, Burlington, ON

3/4 light industrial + 1/4 office space Includes General Lab, Dimensional Lab, Spectrum Lab, CMM Lab, open and closed offices areas, open collaboration areas.

Spin Master–110,000 SF

Interconnecting stair, high-end custom finishes, theatre, video studio, compressed schedule

The Azrieli Foundation Tenant Improvements–12,500 SF

2 St. Clair Ave. W., Floors 8, and 9, Toronto, ON

Tenant leasehold improvements, interconnected convenience stairs, AV, Communications

Interior Renovations and Alterations Dream Unlimited Renovation Program–15,000

Various addresses, Toronto, ON

Alex is responsible for 4 of the 8-project, 22,500 SF revitalization program which includes a mass washroom renovation in six buildings.

IMAX Headquarters–55,500 SF

2525 Speakman Drive, Mississauga, ON



ALEX MOYANO

PROJECT MANAGER

Support the Estimating Team in Pre-construction with schedule and budget revisions. Responsible during construction to ensure communication and schedule + budget achieved.

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The Azrieli Foundation Tenant

Improvements-12,500 SF

2 St. Clair Ave. W., Floors 8, and 9, Toronto, ON

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Interior Renovations and Alterations Dream Unlimited Renovation Program-15,000

Various addresses, Toronto, ON

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IMAX Headquarters-55,500 SF

2525 Speakman Drive, Mississauga, ON

A multi-phased 3-year renovation including kitchen, conference & meeting rooms and a cafeteria.

Canada Goose Toronto Headquarters-40,000 SF

250 Bowie Ave., Toronto, ON

Manufacturing and warehouse space renovation

Atria Lobby Renovation-12,000 SF

2255 Sheppard Ave. E., Toronto, ON

Atria 1 Lobby and P1/P2 stair vestibule renovations

Canada Infrastructure Bank-2,000 SF

150 King St. W., Suite 2309, Toronto, ON

Interior Fit-out

CommScope Design-Build-8,000 SF

90 Matheson Blvd. E., Suite 803, Mississauga, ON

Decommissioning of old office & design & build of new offices in two phases.

NHLPA - 17,800 SF

10 Bay Street, Floor 3, Toronto, ON

Interior fit out on a compressed schedule.



MELANIE THOMPSON

BA. MA

SITE MANAGER

Site Manager, on site every day managing the build out, coordinating trades and proactively addressing any quality and resourcing issues. Support in pre-construction.

QUALIFICATIONS & RESPONSIBILITIES

Melanie's hands-on construction experience gives her a definite advantage, whether performing as a Project Manager or as a Site Manager. As a Project Manager, Melanie embodies the need to plan and monitor every aspect of people, product, processes and price necessary to set and achieve client objectives and project goals. As Site Manager, Melanie ensures that the project is executed safely and meet the project quality, schedule and financial goals.

Melanie holds a bachelor's degree followed by a Masters in Science. She has a strong financial background and is an accredited financial planner from the Canadian Securities Institute.

Pre-Construction: Melanie's involvement in pre-construction is a resource to our internal team. She will review drawings with our project team to identify constructability issues that the PM team may not have identified.

Construction: Melanie plays the critical role of ensuring all site staff stay focused on proactive management throughout the project. She reviews quality, safety and assists in planning for a 2-week rolling micro-schedule to achieve the overall delivery. She develops and oversees all strategies to overcome barriers on site in the physical construction of the space.

Post Construction: Projects are only as good as they finish. Melanie is responsible for scheduling site resources to ensure we are proactively managing and resolving all deficiencies. She is charged with completing deficiencies in 15 days of the list being released from consultants.

YEARS OF EXPERIENCE

FIFTEEN

EDUCATION / TRAINING

Bachelor's Degree,
Lakehead University

Masters Degree,
University of Northern
British Columbia

Accredited Financial Planner,
Canadian Securities Institute

PROJECT AVAILABILITY

25% (PRECON)
100% (CONST TO CLOSE)

SELECTED PROJECTS

Crimson Fit-Out - 2,300 SF (Design-Build Project Manager)

CIBC Square, 81 Bay Street, 34th Floor
Interior fit-out under the FI Configurator Program, includes a mix of office, meeting rooms and collaborative areas.

Sumitomo Canada - 3,500 SF

150 King St. W., Floor 23, Toronto, ON
Project was initially an FI Consults/Plans Design-Build project, assisting with design of reconfiguration of existing space and subsequently awarded the construction.

CommScope – 8,000 SF

90 Matheson Blvd. E., Suite 803, Mississauga, ON
FI Design-Build Project: Decommissioning of old office & design & build of new offices in two phases.

GM Storage Room

1875 Buckhorn Gate, Mississauga, ON
FI Builds Project: Add-on for existing client - Conversion of a bike room.

BGO Model Suite - 1,600 SF

55 University Ave., Suite 1604, Toronto, ON
FI Plans Project to incorporate two offices, a meeting room and kitchen in an existing space.

GWL - 33 Yonge Vestibule Renovation - 1,000 SF

33 Yonge St., Toronto, ON
Renovation

CDW Canada - 60,000 SF

Wells Fargo - 75,000

Dream REIT - 6 Projects

Various locations
Ranging from 3,500 SF to 5,000 SF

Harcourts - 40,000 SF

A manufacturer of graduation gowns

Greystone Insurance & Financial Services - 55,000

Acklands Grainger - 60,000

Canadian Tire Corporation - 120,000

Life Labs - 2,000 SF

Approximately 20 projects completed

McCormick – 100,000 SF



SANDRA RODRIGUEZ

M.Sc., B.Sc.

SENIOR PROJECT COORDINATOR

Sandra ensures that all project communications are streamlined and efficient. Using Procore, she oversees her team who will manage all RFIs, submittals, minutes, changes, drawings, site instructions, and deficiencies. She will ensure that all deficiencies are looked after and hand-off of all closing documentation is complete.

QUALIFICATIONS & RESPONSIBILITIES

Sandra achieved her Bachelor's Degree in Architecture at Universidad Católica de Honduras, Nuestra Señora Reina de la Paz in 2011, and a Masters Degree in Project Management and Business Administration at Universidad Tecnológica Centroamericana in Honduras. She began her career as Draftsman, moving on to Architect Designer, Design Coordinator/Manager, and finally, Senior Architect before moving to Toronto in 2018.

She joined Flat Iron in the Project Coordinator position and most recently as Senior Project Coordinator. Her architectural background has been a definite asset at Flat Iron and will be invaluable for this project. Sandra will also be overseeing a variety of logistics related to scheduling and will oversee the project coordination team.

Sandra will ensure that within 24 hours of receiving the final deficiency list from the consultants, we will upload to Procore the assignments to specific trades and will set dates for completion. Our goal is always to be 'off of this list' within 15 days, and Procore and our PM team actively manage this delivery on all projects. In the same time frame, Sandra will hand off all warranties, training documents, and close-out documentation.

YEARS OF EXPERIENCE

EIGHT

EDUCATION

Foundations of Project Management, University of Toronto (2020)

Construction Law Course, George Brown College, Toronto (2019)

Construction Site Safety Course, George Brown College, Toronto (2019)

Engineering Software Skills Enhancement Certificate, Humber College, Toronto (2018)

Ontario Building Code, Health and Safety, LEED, Project Management, Estimating, AutoCAD / Revit

M.Sc. Degree in Project Management and Business Administration, Central American Technological University (UNITEC), Tegucigalpa (2015). Magna Cum Laude recognition. (Equivalent to a Master's Degree in Project Management as determined by World Education Services, Toronto, ON)

B.Sc. Degree in Architecture, Catholic University of Honduras (UNICAH), Tegucigalpa (2011). (Equivalent to a Bachelor's in Architecture as determined by World Education Services, Toronto, ON)

PROJECT AVAILABILITY

25% (PRECON)

50% (CONST TO CLOSE)



SELECTED RELEVANT PROJECTS

TPC at Osprey Valley Golf Club - 120,000 SF

18821 Main St., Caledon (Alton), ON

Pre-construction services for various buildings as part of a master plan for an expansion and multiple improvements on an existing 1700 acre site in Caledon.

First National - 130,500 SF

16 York Street, Floors 17, 18, 19, 20 and 21, Toronto, ON

New building tenant fit-out featuring raised floor system

The Azrieli Foundation Tenant Improvements - 12,500 SF

2 St. Clair Ave. W., Floors 8, and 9, Toronto, ON

Tenant leasehold improvements, interconnected convenience stairs, AV, Communications

Sobeys – Interior Demolition & Office Fit-out - 34,000 SF

364 Richmond St. W., Toronto, ON

Innovation hub demolition and interior fit-out of Floors 2, 3 & 4, in phases. Project features include meeting rooms, open office spaces, washrooms, serveries, and locker rooms.

Mohawk Toronto Showroom - 5,000 SF

162 King St. E., Toronto, ON

Interior Renovations to a high end showroom within a mixed use high-rise building. Sustainability features certifications for Living Building Challenge (LBC) Materials Petal Certification and WELL Building Certification.

BentallGreenOak, 7th Floor Back-to-Base & 8th Floor Corridor, Washrooms + Lobby

121 King St. W., 7th Floor, Toronto, ON

7th Floor B2B + 8th Floor B2B + Corridor, Elevator Lobby & Washrooms Fit Out

DESIGN EXPERIENCE

National Lab for Health Surveillance – Design

Management - 26,921 SF

Tegucigalpa, Honduras

Design management for an administrative building, lab building and M&E equipment building.

Cultural Centre Preliminary Study & Design

Puerto Cortes, Honduras

Design and prepare a technical narrative description of the project for the client, prepare a preliminary construction execution schedule, soil studies, and budget for construction, operation and maintenance of the building as well as an environmental study.

Botanical Centre Preliminary Study & Design

Puerto Cortes, Honduras

Prepare preliminary studies for a design consisting of a visitor center (with exposition rooms), plazas and fountains, lagoon, playgrounds for children, tree house, washrooms, greenhouse, butterfly farm, iguana farm, administration, kiosks and parking.



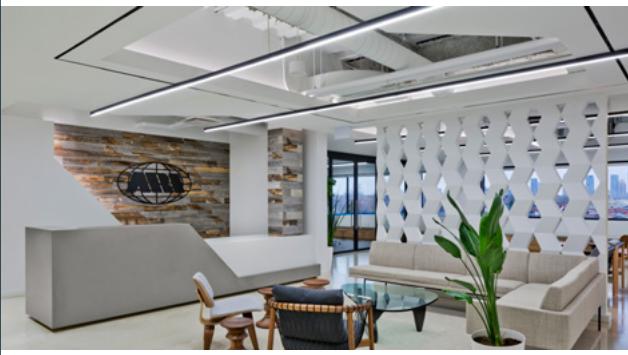
C Additional Case Studies



ARI Financial



Design Partner: Straticom
Location: Mississauga
Size: 47,000 SF
Contract Type: Design Build



ABOUT

Pre-Construction Services

Flat Iron assisted in the overall strategic planning of the project. We prepared a hybrid Schedule D Budget to create a realistic costing benchmark. This allowed the client to achieve their design-vision while providing cost certainty and execution. We worked with the client to procure a signage permit in advance while quarterbacking the structural design and implementation at the upper-parapet for corporate signage. Our team closely managed the client's goal to achieve gold LEED® certification in a Class C building.

Construction Services

Complete demolition and fit-out over three floors – all within an occupied space. The space is largely open with 75% open space and 25% closed space for offices, meeting rooms, support areas and amenities. All offices and meeting rooms have full height glass fronts. The elevator lobbies were upgraded to incorporate industrial and contemporary design elements.

Post-Construction

Flat Iron orchestrated the final stages to achieve Gold LEED® certification with great success. This included commissioning of all new mechanical units including heat pumps and Energy Recovery Ventilation units on each floor to ensure fresh air intake met LEED requirements. Lastly, Flat Iron promoted the success of this project through the Remy awards, giving the client recognition in their industry and assisting ARI in being recognized as one of the best places to work in Canada. The ARI project was nominated for a REMY award for interior design and achievement of 40,000 square feet and greater.

PROJECT CHALLENGES AND SOLUTIONS

1. Occupied Space

The office was occupied during construction which required managing project sequencing throughout the construction schedule. This was accomplished in their existing premises, as ARI required operations to be "business as usual".

2. Industrial Design Intent

Given the industrial "design intent", construction practices had to be implemented to adhere to OBC, such as sprinkler & smoke seals, construction and installed to separate open ceiling & more traditional office T-bar ceiling.

3. Existing Site Conditions

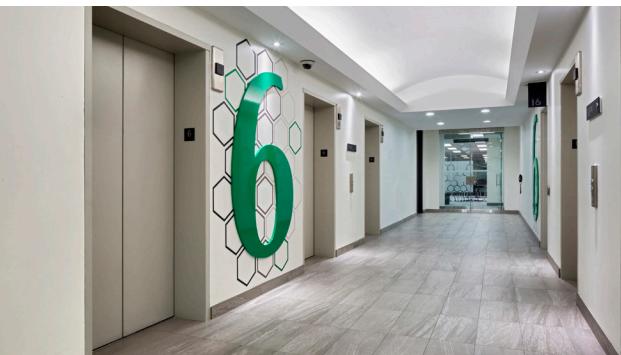
Concrete slab as well as finished surfaces throughout the common areas were sub-straight. Existing site conditions needed to be taken into consideration during installation of the PC350 front, vinyl flooring and carpet.

PROJECT FEATURES: Phasing, elevator lobbies, occupation during subsequent stages.

Desjardins



Design Partner: SGH Design Partners
Location: Mississauga
Size: 200,000 SF
Contract Type: CM



ABOUT

Pre-Construction Services

Flat Iron provided full pre-construction services. We met prior to full design and drawing completion and provided constructability input. Our team also assisted with providing input on potential mechanical and electrical consultants. From the start, we acted as the main liaison between the landlord and the client.

Construction Services

The two-building project involved interior renovations, densification and expansion over multiple phases. Flat Iron's scope of work included demolition of existing electrical, new drywall partitions, server, boardrooms, painting works, carpet, vinyl and tile flooring, t-bar ceiling, HVAC, plumbing, electrical, bathrooms, AV, communications, and security.

Post-Construction

Flat Iron was able to close out deficiencies within our two-week deficiency completion standard.

Flat Iron has since been awarded additional projects including an I.T./LAN Room renovation/relocation project at the same location.

PROJECT CHALLENGES AND SOLUTIONS

Phasing

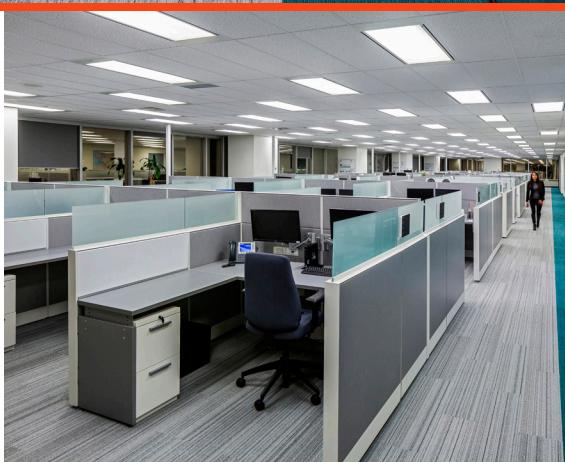
Each floor or phase was to be treated as an individual project and as such required end-to-end construction management services, each as separate projects.

PROJECT FEATURES: Phasing, elevator lobbies, multi-building



Desjardins

Design Partner: SGH Design
Partners
Location: Mississauga
Size: 200,000 SF
Contract Type: CM



First National

Tendered and awarded - \$500,000 under budget

Floors 17 to 21, Toronto, ON



Design Partner: B+H Architects
Location: Toronto
Size: 130,000 SF
Contract Type: Construction Management



ABOUT

First National is a recognized leader in real estate financing, in business for over 30 years. Flat Iron is pleased to have been awarded this prestigious project which is one of two projects awarded in the newly built Cadillac Fairview tower located in heart of downtown Toronto at 16 York Street.

The 4 ½ floor project incorporates a raised flooring system with Camino Modular Systems Inc. The raised floor system provides better environmental control and easy access to HVAC, electrical and data cabling. The space will feature classic and distinguished reception and meeting room spaces as well as an executive Boardroom.

Strategies implemented included strategically awarding key sub-trades to move the project forward while working through value engineering; and, reviewing key floor/area turnover dates to ensure both the client and Flat Iron's schedules are aligned.

Flat Iron also worked closely with the landlord to sort out logistics of deliveries and building operations and of course, logistics related to the health and safety of our entire team, consultants, and subtrades in a very challenging time.

PROJECT CHALLENGES AND SOLUTIONS

The project had a 30-week Pre-construction and tendering period where we worked intensely with B+H and the consultant and client team on key elements affecting budget and schedule, including ordering of long-lead items, and strategic timing of the installation of the raised flooring system with Camino, who was working on other projects within the building. Flat Iron suggested alternate materials/finishes that were better expedited, given the pandemic situation at the time. The project was tendered and awarded - \$500,000 under budget

All of this began with a strategic Partnering session with all parties, setting a clear line of communication and project expectations with not only the project team, but also the Landlord and with the project trades, before mobilization.

This IS key to keeping this project on target for a successful completion.

PROJECT FEATURES: Interconnecting staircase, A/V, communications and sound masking, elevator lobbies, high end finishes/millwork, executive boardroom.

IMCO (INVESTMENT MANAGEMENT CORPORATION OF ONTARIO)



F
FLAT IRON
BUILDING

Design Partner: SDI Interior Design
Location: Toronto, ON
Size: 66,000 SF
Contract Type: Construction Management



ABOUT

The Investment Management Corporation of Ontario (IMCO/Client) is designed to serve public-sector clients in Ontario. With over \$60 billion in assets under management, IMCO is independent and operates at arm's length from government. In order to accommodate its significant growth and plan for the future, IMCO is consolidating its office space in Downtown Toronto to 16 York Street, a newly built tower by Cadillac Fairview. The project is one of two fit-up projects (First National is the client) that Flat Iron is constructing at this location.

IMCO's space involves the renovation and fit-up of approximately 66,000 square feet of office space on three floors. The scope includes a reception area, multi-function café, meeting rooms, offices, open space for workstations, storage rooms, open collaboration areas and server room.

The project features internal stairs and a raised flooring system with Camino Modular Systems Inc. The raised floor system will provide better environmental control and easy access to HVAC, electrical and data cabling.

Working with Cresa, expediting strategies implemented included strategically awarding key sub-trades to move the project forward, while working through value engineering; and, reviewing key floor/area turnover dates to ensure both the client and Flat Iron's schedules are aligned.

Flat Iron also worked closely with the landlord (Cadillac Fairview) to sort out logistics of deliveries and building operations.

PROJECT CHALLENGES AND SOLUTIONS

1. Coordination within the building: There were up to five general contractors and there many sub trades active in the building on various floors, in addition to the base building constructors still working in the building. This required very proactive communication and interaction with the landlord to coordinate deliveries, loading docks and elevators. It also required good cooperative work with competitors in the market to ensure everyone was successful.

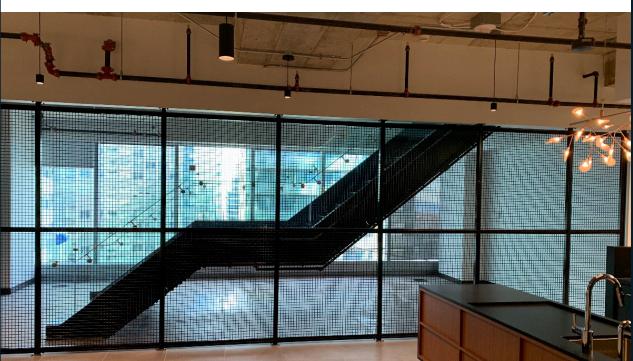
2. Limited Resources for Camino: With so many buildings using Camino systems for their pressurized raised floor, Camino was feeling resource and staffing pressure to find qualified staff. We needed to work collaboratively with them and other trades to sequence work and ensure a safe sight and clean plenum. We did this all while maintaining COVID-19 standards for health and safety and delivering on time.

3. COVID-19 Protocols: 16 York is one of the most active buildings in the down town core during the pandemic. There were strict protocols by Cadillac Fairview which must be adhered to in order to stay safe in common space, corridors, loading docks and elevators. In addition, within our floors, the rigour on distancing, signage, PPE use, signing in, self declarations and air quality were a focus of a full-time site staff to ensure the schedule was not jeopardized.

IMCO (INVESTMENT MANAGEMENT CORPORATION OF ONTARIO)



Design Partner: SDI Interior Design
Location: Toronto, ON
Size: 66,000 SF
Contract Type: Construction Management



ABOUT

The Investment Management Corporation of Ontario (IMCO/Client) is designed to serve public-sector clients in Ontario. With over \$60 billion in assets under management, IMCO is independent and operates at arm's length from government. In order to accommodate its significant growth and plan for the future, IMCO is consolidating its office space in Downtown Toronto to 16 York Street, a newly built tower by Cadillac Fairview. The project is one of two fit-up projects at this location (First National Financial is the other client).

IMCO's space involves the renovation and fit-up of approximately 66,000 square feet of office space on three floors. The scope includes a reception area, multi-function café, meeting rooms, offices, open space for workstations, storage rooms, open collaboration areas and server room.

The project features internal stairs and a raised flooring system (pictured here) with Camino Modular Systems Inc. The raised floor system will provide better environmental control and easy access to HVAC, electrical and data cabling.

Working with Cresa, expediting strategies implemented included strategically awarding key sub-trades to move the project forward, while working through value engineering; and, reviewing key floor/area turnover dates to ensure both the client and Flat Iron's schedules aligned.

Flat Iron also worked closely with the landlord (Cadillac Fairview) to sort out logistics of deliveries and building operations. Despite an earlier shut-down due to COVID, the project is currently on track for completion.

PROJECT CHALLENGES AND SOLUTIONS

1. Coordination within the building: There are up to five general contractors and there many sub trades active in the building on various floors, in addition to the base building constructors still working in the building. This requires very proactive communication and interaction with the landlord to coordinate deliveries, loading docks and elevators. It also requires good cooperative work with competitors in the market to ensure everyone is successful.

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Loopio



Design Partner: X Design
Location: Toronto
Size: 30,000 SF
Contract Type: Lump Sum

ABOUT

Loopio is a high growth technology firm that had moved multiple times in the last few years. With a projection of quadrupling by the end of 2018, they were urgently in need of the space, both to house new employees and to support their recruitment mandate to attract new talent.

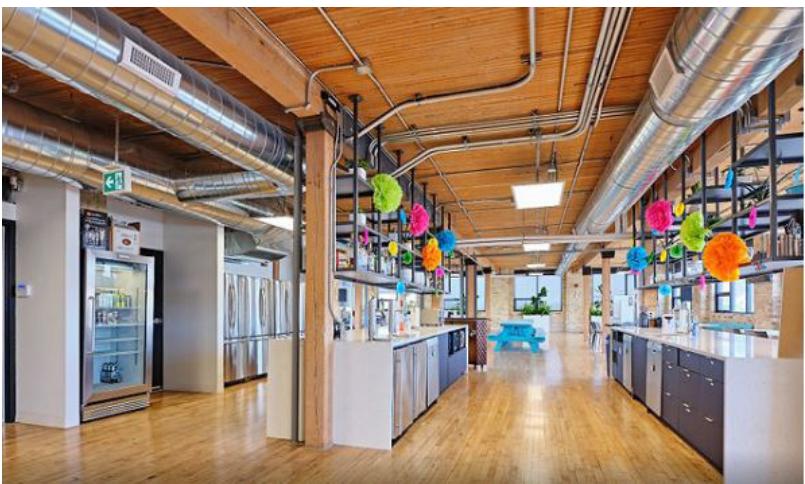
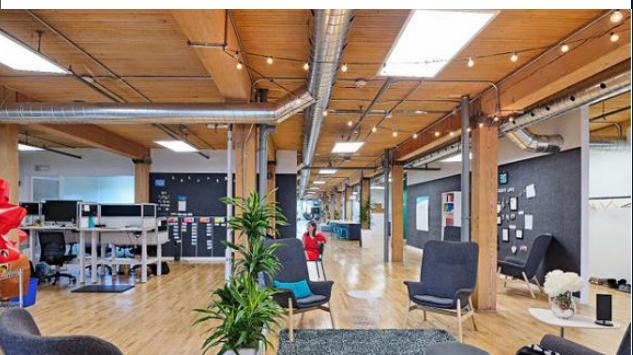
The 30,000 SF was built out and was ready for move-in, in just 6.5 weeks. The client was incredibly happy with the progress that allowed for their move in such a short duration. This was accomplished by careful planning of what Flat Iron classified as "Day Two" items which were completed over another month, post-move-in. The client was ecstatic with their new space which has successfully accommodated the employee growth they projected.

PROJECT CHALLENGES AND SOLUTIONS

Compressed Timeline

Given the growing demand of Loopio and a quickly looming deadline to vacate their previous space, the Flat Iron team was faced with an incredibly tight timeline to build out space in time for occupancy. Our team worked with X Design and Loopio to identify Day Two items that could be completed post-move, without disrupting the Loopio team. We were able to get the team into their new space by the original deadline.

PROJECT FEATURES: Brick and beam building, compressed timeline.



Luminus Financial



F
FLAT IRON
BUILDING GROUP

Design Partner: SGH Design Partners
Location: Toronto
Size: 7,000 SF
Contract Type: Construction Management



ABOUT

Luminus Financial (formerly Starnews), an Ontario credit union, was founded in 1951. Headquartered in Toronto, Luminus provides banking products and services, including business and personal banking, loans, investment products and insurance to anyone living or working in Ontario. Luminus started as the designated credit union for employees of Toronto Star, Metroland, Air Canada, Globe and Mail, Campbell's and Metro.

Flat Iron's construction management mandate was to provide design-assist services and leasehold improvements at this new "financial hub" which aims to provide a boutique banking experience to Luminus Financial clients.

The new branch will offer a "one-stop shop" for financial solutions, all the while demonstrating the credit unions' commitment to providing more member-oriented services.

PROJECT CHALLENGES AND SOLUTIONS

1. A Fast-tracked project;
2. Fit-up required major mechanical & electrical modifications, as space was previously used as a restaurant;
3. Focal exterior design feature at Queens Quay entrance required detailed structural exploration.

Flat Iron successfully completed the project on schedule: After reviewing the scope of work with the project team, lead-times beyond substantial completion were identified and, in collaboration with our sub-trades and material suppliers, alternatives were proposed to the design team and service provider. With their approvals, construction moved forward at an accelerated pace.

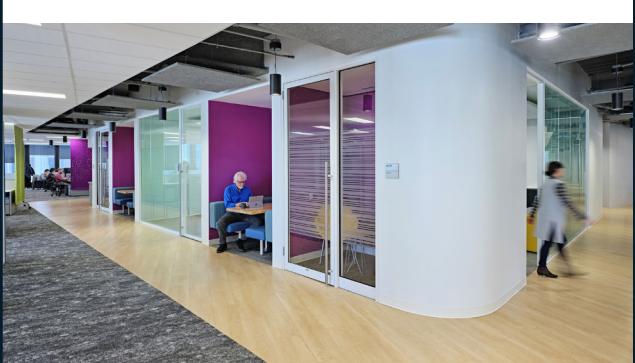
All construction milestones were successfully met, including an feature canopy's design mandate and the client, designer and service provider were all pleased with our efforts.

SAP CANADA

Head Office (Waterloo location subsequently awarded)



Design Partner: Kasian Architecture
Location: Toronto
Size: 60,000 SF
Contract Type: CM



ABOUT

Pre- Construction

With a compressed schedule of 6.5 months from award of Design and CM contracts to move-in, the pre-construction process needed to be fluid. Sequential tendering on 80% drawings were required, allowing construction to start prior to completion of the design. We employed a permit expeditor to receive the permit in 2.5 weeks and many design elements such as the feature stairs were completed in a design-assist fashion post-award of the trades.

Construction

Full build-out of three floors, over 60,000 SF including open office/collaboration comprised of large, medium, small meeting rooms, telephone rooms, central lunchroom, training rooms, etc. All 60,000 SF was completed for move-in within 10 weeks. The interconnecting staircase was completed post-move over a 20-week duration. A/V and communications played a significant role in design and construction.

Post Construction Services

Phased deficiencies were based on floor occupancy, followed by completion of the front reception and finally, the stairs. In each case, deficiencies were rectified within 2 to 3 weeks. Due to the compressed schedule, day 2 items were clearly outlined and a separate schedule provided for these. Closeout documents were 100% collected within 1 month of final substantial performance.

PROJECT CHALLENGES AND SOLUTIONS

1. Compressed Schedule

The pre-construction phase, along with extensive teamwork between the consultants, Flat Iron, and the trades was critical to the success of this project. This challenge was achieved through a combination of early procurement, design-assist and the use of a permit expeditor to gain access to the space early.

2. Broken Service Elevator

The service elevator was down for three of the 10-week project causing significant logistical challenges: double handling of materials, securing additional storage and additional cleaning to maintain a safe site. We used additional labourers to hand bomb materials and after-work hours to move materials in addition to making use of rare windows of service elevator testing.

3. Trade Sequencing

Trade sequencing varied from the standard and required significant coordination and managing of personalities between trades to allow them to work out sequence and in the same space at the same time. Trade management was only possible with a very seasoned site supervisor and office team who could manage the high-pressure environment that results from multiple people in the same space at the same time.

PROJECT FEATURES: Interconnecting staircase, serveries, reception, elevator lobbies

PROJECT: FI subsequently completed the build-out of SAP's 33,000 SF Waterloo Office

Scotiabank Eco 3 & Eco 6



Design Partner: HOK (Eco 3) & Our Cool Blue Architects (6)
Location: Toronto
Size: 90,000 SF
Contract Type: Lump Sum

ABOUT

Pre- Construction

Our team spent a great deal of time in the pre-construction phase helping the client find added value for this project. We consulted on more complex assemblies such as the feature stairs to further develop the design and find better value for their overall spend.

Construction:

Flat Iron created an open office environment, with a mix of t-bar and open ceiling; serveries on every floor with two centralized lunch rooms and reception on one of six floors. An interconnecting feature staircase between all six floors was installed and the elevator lobbies received a full refresh.

Post - Construction

We completed deficiencies and had close out documents collected and submitted allowing the client to apply for T.I. within one month of substantial. This was done through proactive QA/QC processes throughout construction and through close monitoring, reporting and following up on all deficiencies and close out documentation post-construction. This project was completed in 2 phases (3 floors in each phase) - each phase was 16 weeks in duration.

PROJECT CHALLENGES AND SOLUTIONS

1. Interconnecting Staircase and Subsequent Structural Requirements.

This required proactive management to gain access to adjacent space as well as landlord approval for the structural requirements. In Eco 3 a substandard trade was mandated by Scotiabank and in Eco 6 we facilitated a negotiated contract for similar pricing with a far more experienced trade.

2. Re-use of Existing T-Bar Ceiling

The existing ceiling needed to be removed, stored and reinstalled without damage. Our Site Supervisor took personal responsibility to oversee the demolition trade and ensure appropriate storage and maintenance of this tile. Although seemingly small, this element can cause significant setbacks if not accomplished properly when closing the ceiling.

3. Simultaneous Construction

Simultaneous construction taking place within the building caused logistical coordination and sound mitigation requirements. We focused on maintaining positive relationships with the landlord and other contractors in the building. We remained proactive, anticipating our requirements and potential overlaps. This resulted in no logistical issues on the project.

PROJECT FEATURES: Interconnecting staircase, serveries, reception, elevator lobbies



Tandia Financial Credit Union

Head Office



Design Partner: SDI Interior Design
Location: Burlington, Ontario
Size: 22,000 SF
Contract Type: Lump Sum



ABOUT

Tandia Financial was looking to consolidate two of their offices in Milton and in Hamilton into one state-of-the-art, central location in Burlington.

Flat Iron was pleased to work with Tandia, through their Project Manager, Cresa Toronto, and SDI Interior Design, on this ultra-modern facility. It consists of a multi-use office with 18-foot open deck ceilings and a mix of private offices, boardrooms, featuring collaboration areas, training rooms, a large cafeteria doubling as a conference center, operable walls, men's, women's, gender-neutral, and universal washrooms, a prayer room as well as green living walls.

Bringing this dated facility up to code within the 16-week compressed schedule was a challenge that Flat Iron's team met head-on, ultimately succeeding in creating an inviting workspace to facilitate employees working and collaborating closely together.

PROJECT CHALLENGES AND SOLUTIONS

1. Raised Flooring

Installing raised floors throughout a project which requires ongoing scissor lift use. We had the raised floors installed in a counter-clockwise rotation following all of the other trades and ensured that if lifts were to be driven on the floors after that, only single man lifts were on the site due to weight restrictions. This coordination was discussed at every trade meeting.

2. Heat Restrictions

The original construction of this building had only one-quarter of the gas metering requirements installed to keep the space heated in order for the rooftop units to be running, which means tasks like laying tile or drywall taping was a major issue, as nothing would dry promptly or properly. Flat Iron communicated this to the client to ensure that they were diligent with Enbridge, to get the meters upgraded by their move-in date. In addition, temperatures in the space were significantly lower, being a free-standing building and so rental heaters, fans, etc. were utilized to keep moving things along.

3. Working cohesively with both the Region of Halton representatives and the building inspectors

This specific Region has its own requirements for many items that supersede Ontario Building Code, so a lot of inspections and pre-emptive conversations with these representatives were necessary in order to ensure things were done right the first time. This resulted in no disruption to service and a smooth transition to live date.

PROJECT FEATURES: Raised Flooring; Utility Upgrades; High-end finishes.

Veeva



Design Partner: Straticom
Location: Toronto
Size: 12,200 SF
Contract Type: Lump Sum



ABOUT

Veeva is a cloud-based Computer software company focused on pharmaceutical application for the Global Life Sciences Industry. One process, one system, and one view across clinical operations. Clients include Pfizer, Novartis, Amgen and Eli Lilly.

Veeva hired Flat Iron to renovate a new floor to accommodate their growth. The new floor included new offices, meeting space, open work stations, a new lunch room and full washroom and shower facilities. The company was looking to create a vibrant open office to attract talent within the growing Toronto market. The work included a games room that considered noise containment for meeting and work space but also allowed the team to socialize and collaborate in a fun way. In addition, some minor changes were completed in the occupied space on evenings and weekends.

PROJECT CHALLENGES AND SOLUTIONS

Concrete Flooring

Existing concrete floor required grinding and polishing and given the age of the building consistency was a challenge.

Scheduling

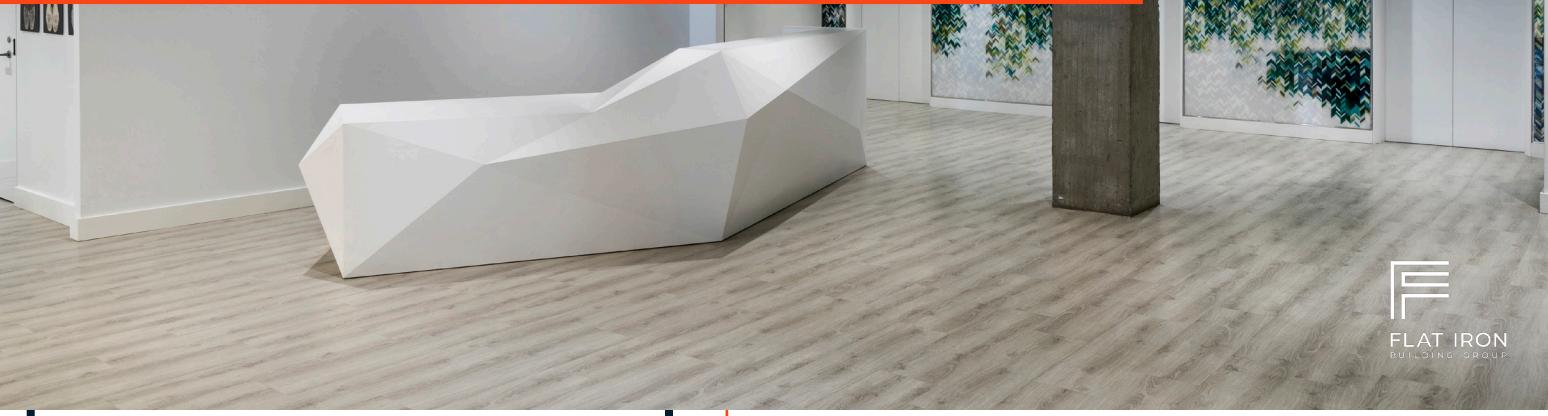
In order to manage noise and odor for occupants, our team was required to schedule the work predominantly during evenings and weekends.

Location

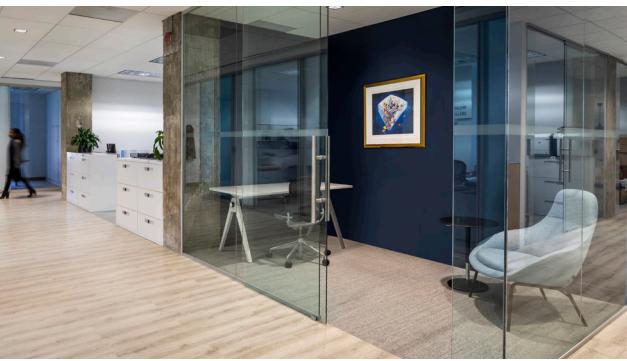
Access, egress and waste management were a challenge given location and nature of the building.



Wildeboer Dellece



Design Partner: SGH Design Partners
Location: Toronto
Size: 20,000 SF
Contract Type: Lump Sum + Negotiated



ABOUT

Pre-Construction Services

Flat Iron's original scope of work included a lump sum contract for the 9th and 10th floors. We then prepared a Class D Budget and construction package for their 8th floor and had it added to the contract. Working with SGH, and the prime consultant, our team played a large role in the value-engineering of this add-on project. We worked heavily with the trades team for electrical and millwork features to develop a result with great value for their budget.

Construction Services

Our mandate was to deliver this high-end interior project on time and on a value-engineered budget. The space included a full refresh of an interconnecting staircase, an LED feature wall, operable glass walls, serveries, and the installation of cloud-like fixtures.

Post Construction Services

Flat Iron implemented our now standard company-wide Close Out Bonus Program. We understand that the last mile is the most important and every employee is encouraged to treat it as such. When deficiencies are rectified within two weeks and close outs are collected and distributed within 30 days, every employee in the company receives a bonus.

The project was so successful that Flat Iron was subsequently awarded the 6th floor refresh project, recently completed.

PROJECT CHALLENGES AND SOLUTIONS

1. Occupied Space

The entire three-floor premise was occupied by the client throughout the construction phase, so working around their fully functioning firm was one of our biggest challenges. We had to ensure health and safety standards were the top priority, not only for us, but for our client's employees that were working within the construction site.

2. Location

The site's location proved to be tricky. Located at one of the downtown core's busiest intersections at Bay and Richmond Streets. The building had no loading area or dock for deliveries. To cope with this challenge, we implemented a strict micro-management plan to handle trades and deliveries during specific hours.

3. Lead Times on High-End Finishes

We used high-end finishes throughout the project, but many had extensive lead times. To avoid any potential delay and keep the project running on schedule, we procured these items early on in the construction phase.

PROJECT FEATURES: Interconnecting staircase (full refresh), A/V, communications and sound masking, elevator lobbies



WELCOME
LOUNGE

D Our Approach



OVERVIEW OF CM SERVICES

PRE-CONSTRUCTION SERVICES & OUTCOME

SERVICES OUTCOME		SERVICES OUTCOME	
Partnering Meeting	Ensures the team strives to the same end goals and has clear communication channels and protocols for problem-solving. The most successful projects are completed with the collaborative partnership on schedule management, cost control, quality, and customer satisfaction.	Constructability Review	Completed at 30%, 60%, 90%, and pre-tender to ensure the site staff is comfortable with the design intent and execution in construction. The constructability review reduces on-site RFIs and concerns during construction, ensuring schedule and quality are maintained.
Landlord Relations	A clear understanding of inclusions/exclusions in the lease and requirements in the tenant manual ensures a positive and efficient working relationship with the landlord while generating the best value for the client. We also feel that the sooner we start building positive landlord relations, the more successful the project.	Procurement of Long Lead Materials and equipment	We will pre-order any long lead items before selecting trade partners to ensure delivery deadlines are met. We re-populate the Submittals log and flag all lead times during the pre-construction process. Pre-ordering long-lead items improves timelines to receive shop drawings, samples, and approvals when we award the trades.
Detailed schedule Preparation + Maintenance	In consultation and coordination with the project team, we prepare detailed, agreed-to pre-construction milestones and construction milestones to ensure no slippage. These milestones will form part of weekly meetings throughout the project to collectively achieve the overall project schedule and act on any slippage early in the process.	Red Line Drawings – On Site	We request a "Red-Line" meeting where all drawings are coordinated on-site with the entire consultant team, Flat Iron, and the service provider before tender. "Red-Line" meetings reduce RFIs in tender and ensure drawings are properly coordinated.
Risk Log Maintenance	We generated collaboratively with the project team to record any project risks in terms of costs, schedule, and quality to stay ahead of any project challenges.	Pre-Qualify Trades	Provide a recommended trade list (4 per division) for review and approval by the project team. We use our Trade Performance database to ensure that only top trades in schedule, quality, value, and completion are recommended. We are open to suggestions from all industry partners to finalize the list.
Budgets (Class D through A)	The budget is one of the most critical tools of the project; the budget is developed from first principles allowing us to detail and articulate cost drivers. We use our proprietary database of current market costs to ensure accuracy. We track variances throughout and provide a component that allows the design team and end client to make trade-off decisions and go / no go decisions quickly.	Preparation of Bid Documents	We will prepare detailed instructions for bidders to accompany the drawings set tender. Before tender, these instructions will be reviewed with the entire project team to ensure a comfort level with the overall approach.
Value Engineering	This will be completed during the budget iterations to ensure we achieve the project's design intent and budget constraints. As Construction Managers, it is our job to work closely with the team to ensure the accuracy of budget numbers and suggest materials and construction projects to create the best alignment of design, quality, schedule, and budget for the client.	Tender	Administer the tender (or sequential tender if required) to all sub-trades, ensuring a minimum of 3 to 4 prices received in each division. This ensures we have the best pricing in the market at the time of tender. All tenders are administered and reported on through Procure. Post tender, we will clarify and bid-level to ensure we have an apples-to-apples comparison of each division. Results will be presented in full to the project team with our contract award recommendations. Upon review and approval by the team, we will formally award subcontracts committing the trade to the price, schedule, and quality.
Design Support + Assist	Suggest alternatives that meet the design intent to improve lead times or costs / where required. Act as support to the design team to assist with constructability, costing, and schedule to maintain design intent and budget and cost control points.	<p>Note: We feel the construction project itself is more efficient and streamlined due to the quality of our Pre-construction services. We do not charge for the executive time to set a project up to succeed.</p>	

IDENTIFY / DISCOVER /COMMUNICATE

1
REVIEW

2
EXPLORATION & STRATEGY

3
REFINEMENT

DEVELOP / CONSTRUCT

4
BUILD

5
TURN OVER

DELIVER
6
COMPLETE

CONSTRUCTION SERVICES

PROJECT IMPLEMENTATION CONSTRUCTION

Manage

- Site Logistics - hoisting, garbage removal, phasing, security, etc.
- New site construction, including the delivery and installation of furniture, fittings, fixtures and equipment
- Fit & Finish Sequencing

Monitor

- Review shop drawings, submittals, orders, deliveries, tests, reports, etc.
- Construction budget & schedules

Coordinate

- Manage and coordinate all change orders, RFIs and modifications to contract
- Integration of Owner Supplied Items
- Furniture Sequencing

Site

- Weekly site visits/as required
- Attend construction meetings
- Health and Safety Standards
- Site Records

Review

- Monthly construction draws
- Cost Control
- Supplier / Vendor invoicing
- Consultant fees
- Contract administration

MOVE IN AND DEFICIENCY

Assist in preparing site for the delivery and installation of FF&E

- New and existing product

Coordinate Move-in, Occupancy & Commissioning

- Manage migration plan
- Install and test technologies

Coordinate Installation of all New and Existing FF&E

- Issue RFP for move consultant

Additional Relocation Requirements

- Review and Assist in facility change issues
- Address changes, I.T., supplies

Deficiency Control

- Review and approve punch lists
- Follow-up and confirm completion

CLOSE-OUT SERVICES

PROJECT CLOSE-OUT

Coordinate Post-move Construction and Post-occupancy evaluations

- Close-out report
- Close-Out Documentation
- Warranties and guarantees - inspection procedures
- Lien Search
- Deposit Management
- Leasehold Capitalization

Letters

- Project Completion
- Final Request for payment

Manage Commissioning Process

- AV & Mechanical
- Training
- Turnover

Review Project

- On time, on budget
- Construction feedback
- Review progress report
- Budget analysis
- I.T. Allowance

A. CONSTRUCTABILITY REVIEWS, VALUE ENGINEERING AND ALTERNATE ANALYSIS

One of our priorities on the award is to complete a site audit with the entire project team, including our site manager. We review the as-built drawings with the design drawings (at current state) and redline any discrepancies in the built environment. A recent project in a brand-new building flagged the disparity in the Camino floor layout that would have impacted all the partition layouts when we hit the site. This sort of "catch" can save thousands of dollars and significant time in the redesign.

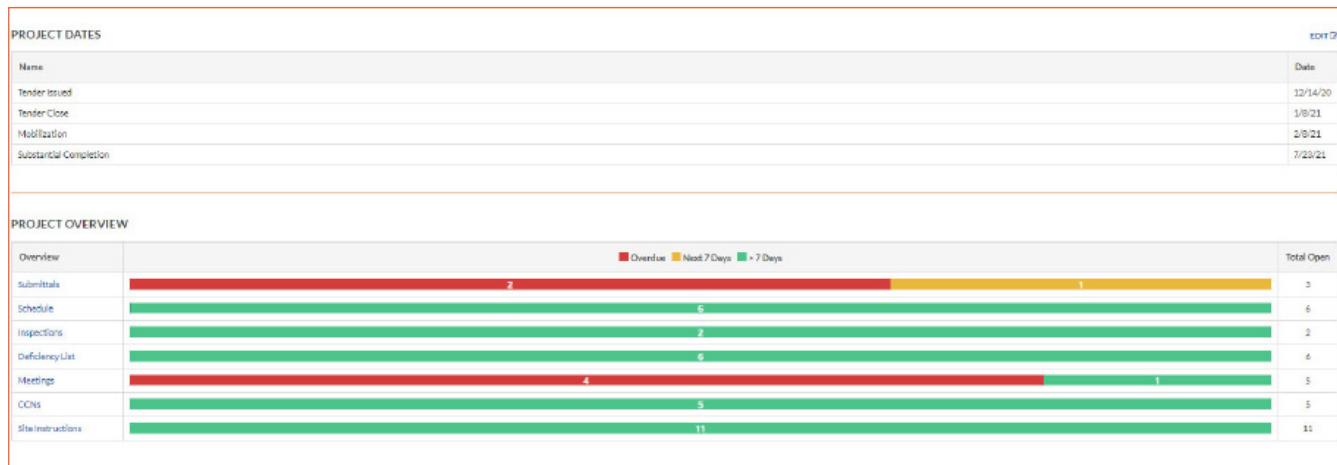
As the design develops, we continue to complete site audits, ensuring any obstructions or existing conditions are flagged for interferences. If the drawings are completed in Revit, we use Navisworks to utilize technology to better flag clash detections than is possible with the human eye.

Our goal with value engineering is to ensure there are no changes in construction. We work collaboratively with the design team in pre-construction to ensure we suggest alternatives that meet the design intent but help achieve the budget and schedule. We have a proven track record of bringing value to the design process and ensuring a good balance between design intent/quality, costs, and project timing.

B. COMMUNICATION, REPORTING AND STATUS UPDATES

Communication is the most challenging part of any project. We are committed to collaborating and listening to all viewpoints to achieve the best results and ensure all perspectives are aligned as the project develops. Communication comes in all forms:

- 1) **Informally** – nothing replaces a phone call, video chat, or a site visit to ensure all perspectives are aligned, and the team is working together. We mandate a weekly face-to-face meeting at a minimum throughout the process (pre-construction through to the final closeout documents being delivered). We also require phone calls with follow-up summaries via email.
- 2) **Formally** – We use cloud-based software, Procore, to provide fully transparent monitoring and measuring of each project element. WE are firm believers in the adage of "what gets measured gets managed. Through Procore, any team member can see the status of each component, including who has actions associated with each piece, including but not limited to: (budgets, schedules, meeting minutes, Submittals, RFIs, Changes, Daily).
- 3) Logs, Photos/Video, health & safety inspections, deficiencies, closeouts, etc.. Not every team member wants or needs to access Procore; however, Flat Iron internally from the top manager down reviews project status to ensure that lead indicators of project challenges are flagged early. Below is a typical project overview accessible to everyone. Within Procore, one can select each item to drive down into more detail on assignments.



C. DRAWING REVIEW AND CO-ORDINATION

Assuming the project is designed in REVIT, we will use our trained Revit technicians to identify interferences or site conditions and produce as-builts. 3D Modeling in Revit allows us to open lines of communication amongst the team, mitigate potential construction conflicts on site, and reduce risk in milestones and cost. 3D Modeling ensures that we identify any existing conditions in the pre-construction phase so we can work with the designers and engineers to redesign if required.

For this project, we will take the base building Revit model (if available) and the tenant Revit model for the CBS Fit-out & Expansion projects and run them through Navisworks to flag any clash detections. This process maximizes the entire team's ability to address coordination issues early in Pre-Construction, eliminating costs and schedule impacts. Quality assurance and control are facilitated by early communication, lessening project delays, and charges stemming from changes, rework, or waste.

Our goal as Construction Managers is to ensure that the only changes in construction are client-driven changes.

FI
 COMMERCIAL FIRST. INTEGRITY SECOND.

CASE STUDY
 (150 KING)

ISSUE

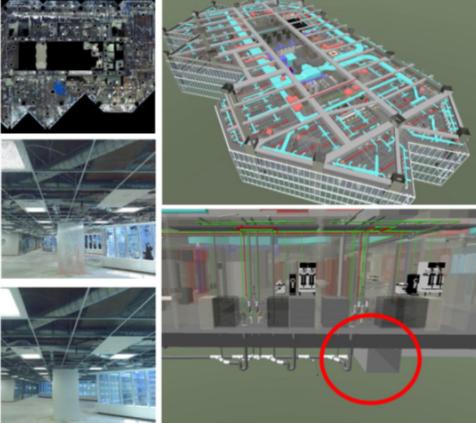
- Design aesthetic determined layout and locations of serveries / millwork
- 3D model of plumbing and HVAC revealed need to core through main support beam.

ACTION

- Flagged issue to the designer early so layout of kitchen could be revisited prior to procurement.

RESULT

- Relocated the sink before material order.
- No delays in procurement
- No Delays in construction



To the left is a case study from a recent project at 150 King West. You will see in the bottom right that the overlay of the mechanical drawings to the structural drawings shows interference with a structural beam. This was identified in pre-construction and lead to redesign and avoided schedule delays or increased costs in construction.

Suppose the design team uses two-dimensional software (AutoCAD) for this project. In that case, we will follow the same clash detection process with a manual review and red-line of drawings at various levels of the organization, including the Project Manager, Site Manager, VP Operations, Chief Estimator, and CEO. Before tender, this red-line is always completed on-site, so any existing conditions can be closely examined.

D. PROCUREMENT

Our approach would be to complete an early tender of key divisions to ensure the procurement process could commence earlier than the main tender to mitigate any schedule slippages. This approach would allow JLL/CBS to lock in critical trades and materials well in advance to ensure no time is lost on-site when required.

We've executed this approach during our most recent large mandate (First National LLP), which resulted in no time lost even during the most recent COVID stay-at-home order and maintained the overall construction schedule.

E. TENDERING

We administer a transparent tender process through Procore to ensure we receive three to four competitive bids in all divisions from qualified trades. Flat Iron has worked with over 2,000 subs trades in the last ten years. We maintain a proprietary performance database on schedule, quality, delivery, communication, submittals, close-outs, and deficiencies. We can tell you clearly which trades are currently performing, workloads and specific teams that should be requested for a build-out of a project of this size, and particular groups we should call upon at each trading partner.

Bid list development and pre-qualification: Flat Iron will review the Landlord's Tenants manual immediately upon award or manual availability from the landlord to ensure compliance with Building Standards. This review will highlight either "mandatory" or "preferred" sub-trades. Flat Iron then determines if it will add specific trades to the list for consideration. In addition, Flat Iron reviews the project's mission and considers budgets, timing, and deliverables, to either add trades or remove potential trades due to current market share.

Flat Iron Building Group Inc. - CM Services Proposal | Silicon Valley Bank
 Project: Silicon Valley Bank – 181 Bay St. 42nd floor

January 7, 2022

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Upon Flat Iron's review of selected sub-trades, Flat Iron submits the list to the Project Manager for review, comment, and potential inclusions. The Flat Iron Executive-in-Charge, Ryan Ogg, will meet with the TEAM and review each trade to ensure consensus on the trade list. Post-approval of the list, Ryan Ogg and Anthony Salvia will contact each trade to ensure they can commit to the timeline and quality and provide competitive pricing. Post discussions, Flat Iron, will create the final list for approval.

Tender call and maintaining sufficient bid coverage for all tender packages: Flat Iron employs our cloud-based software to invite trades to bid. The reporting system for trades will be distributed to the PM to provide transparency to the bid. To create the most competitive bidding process, Flat Iron believes that you should invite no more than five trades to bid on each division of work. We find more time is committed by their estimating department when the odds of success are more significant. We recognize that some trades may be single-sourced and have the resources to vet costs using our historical database. In addition, if a site tour is an option, Flat Iron prefers to meet trades on-site before closing, typically the week after receiving the tender package. This is done for two reasons: first, they can review drawings before the walk-through, and second, the trades have a chance to review the building characteristics.

Bid Opening and Evaluation: Flat Iron prefers to provide trades with three weeks to price projects. Flat Iron suggests sealed tenders for key trades such as Drywall, Millwork, Mechanical, and Electrical; however, we can ensure all trades are hand delivered at the PM's request. Note: this sometimes hinders as small buckets of work do not close due to a current robust marketplace. Also, Flat Iron can complete the project at any location but has typically closed at our office, which is more convenient for trades. At this time, envelopes are time-stamped, filed, and delivered to the PM's preferred location to open and witness. Further, Flat Iron as your CM provides a pre-populated chart with trades by division so pricing and review for comments can be made by each TEAM member who is invited to the tender opening.

Bid Summary and Documentation: Flat Iron will turn around our critical trade analysis within 48 hours and follow up with the balance of trades within a week of opening. Flat Iron provides a detailed summary with notations and qualifications before approval sign-off from Project TEAM. Flat Iron will provide all documentation to the PM for record purposes. Post this review with the project TEAM; we submit formal Contractor Award Recommendations for approval before formally awarding the sub-trades.

F. RFI AND CHANGES

The advantage of engaging in a CM contract is the ability to limit changes during construction through proper planning, review, and selection during design development. Flat Iron rarely has changes in the structure under a CM mandate due to rigorous site audits, drawing review, and value engineering in pre-construction. The only changes that could happen would be client driving changes affecting the layout and functioning of the space.

If there are client-driven changes, the most crucial consideration of Flat Iron in change management is to ensure the process moves quickly (See Appendix C for Flat Iron Change Order Process Flow Chart) and the client pays a fair price. By tracking RFIs, change documentation, quotes, and approvals, including the days aged, we can collectively stay on top of the movement of this paperwork through the process to ensure the project is not unnecessarily delayed. We typically discuss "allowable/required turnaround times" in our kickoff meetings to ensure we can achieve the schedule laid out.

G. SCHEDULE MANAGEMENT, TRACKING AND REPORTING

Flat Iron uses Microsoft Project to document and manage project schedules throughout the life of the project. Before the plan is developed, Flat Iron considers all necessary work, sequencing, materials required, the delivery of products to the site for installation, and looks at long lead items and the best approach for having the space built out. Our project schedules encompass the construction and the entire project so that we can quickly highlight the critical path and red flag potential conflicts that could result in extremely tight timelines and completion dates. Flat Iron is proactive in making recommendations regarding the best approach (e.g. pre-ordering long lead items), building to "hold to" dimensions, and fast-tracking where required.



Also critical to the project's success is the coordination between the core team and the awarded Construction Manager, mainly through the tendering stage. Throughout that phase, the Flat Iron Project Team will be involved to provide technical assistance, constructability reviews, and assistance on elements that will impact the budget and schedule.

CHALLENGES TO SCHEDULE MANAGEMENT

Decision Making - Taking too long to make decisions can result in a delayed schedule. It will be essential to ensure CBS knows the impact of delays with decision-making. Following up with the decision-maker will be critical to ensure decisions are made within the allotted schedule. They are delaying decision-making and authority for decision-making on the client (leaving open may put things behind - such as choices on materials/design).

Accelerated Turnaround - Accelerated turnaround on RFIs Submittals, changes, and approvals will keep the project moving. Procore allows all of these items to be updated for review and easily accessed by all team members. By keeping on top of these items and responding quickly, we have mitigated many project setbacks.

Communication - Clear Communication on delays, RFI responses, change approvals, shop drawing reviews is imperative to ensure everything is addressed correctly. Flat Iron used a transparent yellow/red warning system and agreed to the escalation process to ensure communication remains our top priority.

H. SITE MANAGEMENT IN A COVID ENVIRONMENT

The management of Flat Iron Building Group Inc. is committed to the Health and Safety (H&S) of its employees and everyone involved in our projects and buildings in which we construct. Due to the current COVID-19 Pandemic, we have changed our H&S manual and policies. Our updated pandemic response manual can be provided upon request but includes and is not limited to:

- Ontario Government Rapid Testing Program on All Sites
- Medical Grade Portable Air Purification Systems
- Daily Self Declarations
- Daily Temperature Screening
- Revised Site Orientation
- Mandatory Masks and other PPE
- Adjusted Sanitation and Cleaning Schedules
- Staggered Work Schedules
- Enhanced Signage



I. HEALTH & SAFETY INCLUDING OVERLAP OF BUILDING CONTRACTOR

Technical training includes Working at Heights, Health and Safety Awareness, WHMIS, and Supervisor Competency (for Supervisors). In addition, Flat Iron has a designated health and safety manager that routinely visits projects for safety management, inspections, and audits. Our health and safety manager is available 24/7 to support staff with all health and safety-related matters, including incident investigations.

In addition to routine training, Flat Iron holds quarterly supervisor and management meetings, including a review of the Flat Iron health and safety management program, applicable practices and procedures, legislation, industry best practices, lessons learned, etc.

We have been a ContractorCheck and ComplyWorks accredited member for the past 6 years and are currently pursuing COR Certification and have all practices/policies and procedures in place. The intention is for an audit in early 2022. We also complete our own internal site audits (level 1 and level 2) regularly on all project sites.

We ensure all our Site Staff have up-to-date H&S training, including:

- o Green Book Training/Fall Protection Training/Asbestos Awareness – Type 1 and 2 / First Aid & CPR/AED / C.S.A. Standards / WH-MIS / Asbestos Awareness Certificate and Confined Space Awareness
- We ensure regular H&S meetings/Toolbox Safety Talks occur regularly for all our projects;
- We ensure that daily clean up and sanitation takes place;
- We ensure H&S is followed at all times – both Flat Iron's policy as well as those of our clients, and any specific requirement for the building;
- We ensure hoarding is in place to control dust and isolate the renovation work, help prevent unauthorized access, and minimize the impact of the building occupants, particularly during the current Pandemic;
- We ensure way-finding signage (specific to COVID-19 procedures) provides the necessary information for all who enter the building; and Flat Iron has a procurement policy for follow up in the event of an accident.

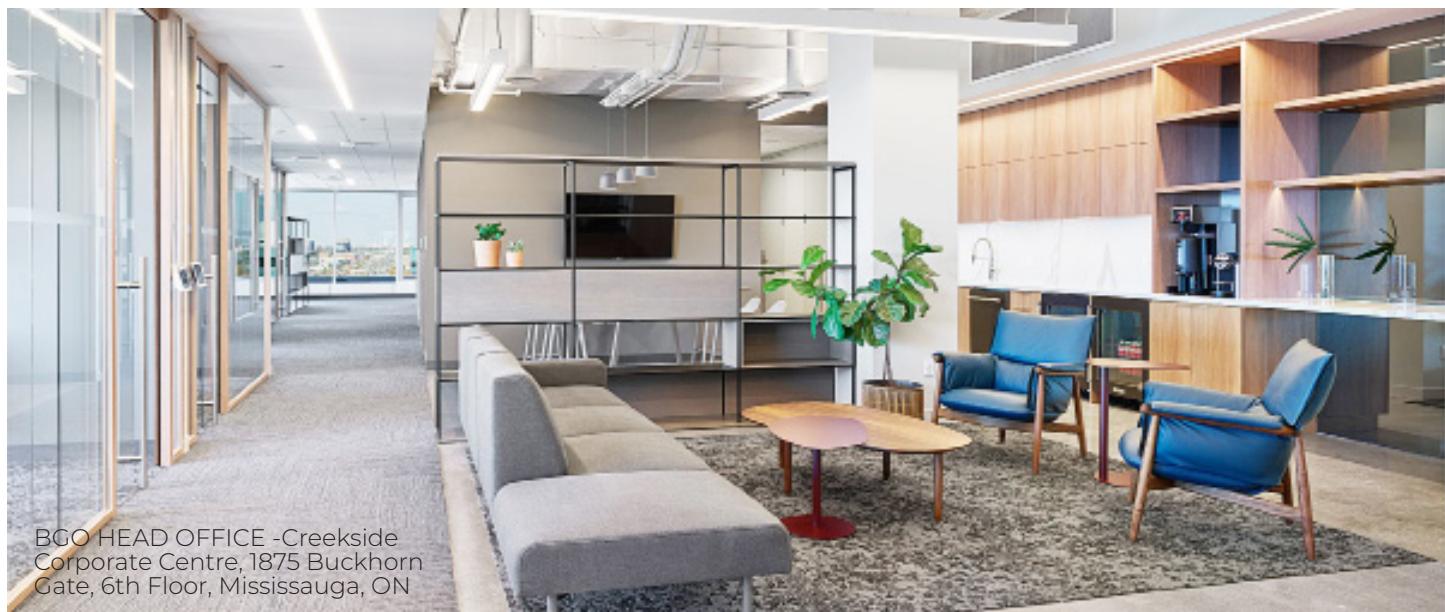
We have our ContractorCheck and ComplyWorks guidelines and deliverables reviewed monthly.

The following can be provided on request :

- » Our Health & Safety Manual.
- » Signed Corporate Safety Policy Statement;
- » Signed Environmental Policy Statement;
- » Current Health & Safety Policy COVID-19 Procedures Changes - Acknowledgment Form
- » COVID-19 - Flat Iron's Commitment
- » Full COVID-19 H&S Re-start Procedures
- » Current CAD-7 Calculations

OVERLAP OF BUILDING CONTRACTOR

It will be important to develop a strong relationship with the landlord, in order to identify challenges that may arise throughout the project. We are no stranger to working in new-build buildings where base building construction may be ongoing. One example of that is our current project for First National Financial which is under way, and recently completed IMCO, both are at the same location in Toronto so careful coordination with the base building contractor and the landlord was required in order to avoid any logistics overlap. In the case of CBS, we know the building is at the late stages of construction and is being leased so this will not apply here. Regardless, our project team will look after all communication between the Landlord, and any other Contractor that may be accessing the site. We foresee no instance where CBS would be deemed the Constructor.



4 Fees Proposal

Fees

Pre-Con

\$2500

CM Fee

6%

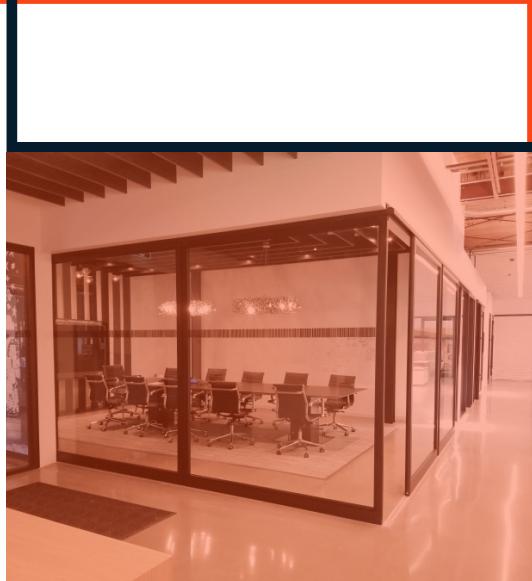
Site Management Fee

\$2500 / week

Project Management Fee

\$800 / week





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