

Virginia Beach City Public Schools
PPEA Request for Detailed Proposals for the
Replacement of Three (3) Schools

Volume One - Electronic Copy

March 18, 2022



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March 18, 2022

Mr. David Sandloop,
Virginia Beach City Public Schools
Office of Purchasing Services, Room 210
2512 George Mason Drive,
Virginia Beach, VA 23456

Re: Virginia Beach City Public Schools Project

Dear Mr. Sandloop,

The Heartland Jordan J.V. team is pleased to submit our detailed phase PPEA proposal for the Replacement of the Three (3) Schools in Virginia Beach, Virginia.

Please reference our Executive Summary for a better understanding on why our team is the bet fit for your project and why we feel our project plan is the best solution for VBCPS.

Section 3 – Project Financing and other proprietary information is located in a separate document labeled “Volume II.” As set forth in the letter contained in Volume II, we request that these materials be kept confidential under the Freedom of Information Act (FOIA), exempt from public disclosure and release.

We acknowledge Addendum 1 dated March 2, 2022, Addendum 2 dated March 11, 2022 and Addendum 3 dated March 11, 2022 in association with this RFP.

If you have any questions or require additional information, we can be reached at (757) 961-2880 | rhonda@hciva-gc.com or (757) 596-6341 | rlauster@wmjordan.com.

Very truly yours,
THE HEARTLAND JORDAN J.V.

A blue ink signature of Rhonda Bridgeman, consisting of a large, stylized 'O' followed by a checkmark-like flourish.

Rhonda Bridgeman, CEO
Heartland Construction

A black ink signature of Ronald J. Lauster, Jr., featuring a complex, overlapping scribble of lines.

Ronald J. Lauster, Jr., President
W. M. Jordan Company, Inc.

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VIRGINIA BEACH CITY PUBLIC SCHOOLS
CHARTING THE COURSE

PPEA REQUEST FOR DETAILED PROPOSALS

Office of Purchasing Services
2512 George Mason Drive
Virginia Beach, Virginia 23456
Phone (757) 263-1175

Attention of Offeror is invited to the Code of Virginia, Virginia Public Procurement Act,
Sections 2.2-4367 thru 2.2-4377 (conflict of interest)

**THE SCHOOL BOARD OF THE CITY OF VIRGINIA BEACH DOES NOT
DISCRIMINATE AGAINST FAITH BASED ORGANIZATIONS**

ISSUE DATE:	February 15, 2022
RFP ITEM NO:	5083
CLOSING DATE:	March 15, 2022
CLOSING TIME:	2:00 p.m.
PROCUREMENT OFFICER:	David A. Sandloop, CPPO

DESCRIPTION OF REQUEST FOR PROPOSALS

THIS DOCUMENT CONSTITUTES A REQUEST FOR PPEA SEALED DETAILED PROPOSALS FROM QUALIFIED INDIVIDUALS AND OR ORGANIZATIONS TO PROVIDE FOR THE REPLACEMENT OF THREE (3) SCHOOLS FOR THE VIRGINIA BEACH CITY PUBLIC SCHOOL SYSTEM.


THE FOLLOWING SECTION MUST BE EXECUTED AND SIGNED BY AN AUTHORIZED REPRESENTATIVE OF YOUR COMPANY.

Company Name: Heartland Construction, Inc. Federal I. D. #: 61-1312635

Address: 4120 South Military Highway Phone Number: 757-961-2880

Chesapeake, Virginia 23321 Fax Number: 757-961-9882

Person Quoting: Eric M. Stichler Date: March 3, 2022
(printed or typed)

Signature:  Email: estichler@hciva-gc.com

TYPE OF OWNERSHIP					
If Offeror is a Minority Business, please indicate the type of classification below – Check all that apply					
	Yes	No		Yes	No
African American Owned		X	Female Owned	X	
Aleutian Owned		X	Hispanic American Owned		X
American Indian Owned		X	Service-Disabled Veteran Owned		X
Asian American Owned		X	Small Business	X	
Eskimo Owned		X	Other		X

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VIRGINIA BEACH CITY PUBLIC SCHOOLS
CHARTING THE COURSE

PPEA REQUEST FOR DETAILED PROPOSALS

Office of Purchasing Services
2512 George Mason Drive
Virginia Beach, Virginia 23456
Phone (757) 263-1175

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THE FOLLOWING SECTION MUST BE EXECUTED AND SIGNED BY AN AUTHORIZED REPRESENTATIVE OF YOUR COMPANY.

Company Name: W. M. Jordan Company, Inc. Federal I. D. #: 54-0637212

Address: 11010 Jefferson Avenue Phone Number: 757-596-6341

Newport News, VA 23601 Fax Number: 757-596-7425

Person Quoting: Michael L. Daniels Date: 3/14/2022
(printed or typed)

Signature:  Email: mdaniels@wmjordan.com

TYPE OF OWNERSHIP					
If Offeror is a Minority Business, please indicate the type of classification below – Check all that apply					
	Yes	No		Yes	No
African American Owned		X	Female Owned		X
Aleutian Owned		X	Hispanic American Owned		X
American Indian Owned		X	Service-Disabled Veteran Owned		X
Asian American Owned		X	Small Business		X
Eskimo Owned		X	Other		

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WHY OUR TEAM

1. This team is purpose built for this project.

The Heartland Jordan J. V. team is organized to get the work done and bring you added value. We bring a specific combination of local knowledge and national expertise to address your PPEA. As our proposal outlines, the partnership of W. M. Jordan and Moseley Architects will lead the charge of the new high schools. Heartland Construction, along with Dills/VMDO Architects will oversee the design and delivery of the Bettie F. Williams Elementary School and Old Kellam High School renovations. This coordinated strategy benefits you, the Owner, by assigning focused teams with strong working relationships to efficiently organize a significant amount of work and deliver added value.

2. We are to committed to authentic Community Engagement.

The Heartland Jordan J. V. team proposes a robust and ongoing engagement process to gather input from key stakeholders, design adaptable learning spaces based on your instructional programs, test and refine core learning environments, facilitate educational commissioning for building users, and provide coaching, evaluation, and support as programs evolve. Jennifer Seydel and the Green Schools National Network (GSNN) will leverage their proven experience, their national perspective, and their specific knowledge of instructional programs at Virginia Beach City Public Schools (VBCPS) to lead this effort and provide third-party accountability. Engagement looks different for every project. We are, first and foremost, here to listen to you and look forward to working with you to design a process that meets your goals.

3. We are committed to innovative learning environments specific to your curriculum - both now and in the future.

Our collaboration with Jennifer Seydel and GSNN has uncovered two important truths about how humans learn. By informing strategies that advance the design of facilities to support and enhance teaching and learning the Team can ensure these truths are addressed thru design and execution in the new schools.

Active Learning: Active learning and pedagogy that supports student engagement is essential to achieve the vision set forth by the Compass to 2025 Strategic Framework and the VBCPS Graduate Profile. The spaces we envision in this project will be designed for individuals and groups to engage in inquiry-based and experiential learning; project and project and problem based learning where students listen and speak, work on their own and in groups, move, draw, and build. Spaces will be agile to accommodate this variety of activity and flexibility and adaptable to support programs as they evolve.

Student Well-Being: Studies demonstrate that the biological needs of learners—light, air quality, thermal comfort, view, and sound – all have an impact on brain function. Everything from the levels of carbon dioxide, to volatile organic compounds, to views to nature, to the spectrum of illumination has been shown to effect learning. Studies also demonstrate the benefits of physical and psychological security, identity and belonging, and social and emotional learning (SEL) in supporting children and adolescents during critical phases of development.

Your re-imagined facilities can be shaped by this research to provide a physical environment that supports learning and improves occupant health and well-being.

WHY OUR TEAM

4. We are committed to sustainable and resilient low carbon facilities.

Design excellence, student outcomes, and energy performance are inextricably linked. The Heartland Jordan J.V. team will collectively prioritize energy performance, carbon reduction, and post-occupancy verification through the application of evidence-based tools and metrics. Moseley is a regional leader in LEED for Schools with 143 certified projects in the Mid-Atlantic and Bryna Dunn has been working with VBCPS for nearly a decade on carbon footprint and emissions reductions for all facilities. CMTA and VMDO are recognized industry leaders in the design of Net-Zero Energy Schools. Contributors to the ASHRAE Advanced Energy Design Guidelines to Net-Zero Energy Schools, these firms have collaborated on a large portfolio of LEED-Certified and Net-Zero Energy buildings for municipal clients with measured net-positive energy performance, including the first LEED Zero School and the largest certified zero-energy building in the world. These projects dramatically reduce operations costs, teach students about advanced technology and stewardship, and serve as powerful symbols of a community's aspirations for the future.

5. We will work with you to minimize disruptions to school operations and support a high-quality learning experience for every student.

We understand that it is the intention of VBCPS to leverage Old Kellam High School as swing space to support these projects and we stand ready to make modifications and improvements to that facility as required to meet VBCPS standards. Our smart planning and phasing strategies will allow for the construction of these new facilities while existing schools remain in operation by:

- Minimizing costs associated with temporary facilities and transportation
- Enhancing temporary facilities to support programs and community identity
- Minimizing disruption for student learning
- Keeping school communities intact during construction

Why It Matters:

Your project is a significant and exciting investment that has the potential to transform the future of learning in Virginia Beach and establish new expectations for VBCPS. We stand ready to work with you to develop a creative approach to project delivery that maximizes the impact of the community's investment and minimizes disruption for students, for school communities, and for the school district at large. We want to be your partners in delivering facilities that exceed your highest aspirations and reinforce a strong sense of community - it is what we love to do.

Let's build something remarkable together!



Volume 1

Tab 1: Qualifications & Experience

Virginia Beach City Public Schools PPEA - Detailed Phase Proposal

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1. QUALIFICATIONS & EXPERIENCE



a. Background information about the organization – e.g. philosophy, ownership, officers and directors, Offerors management structure, organization chart of the firm, project team, etc.

Our proposed project team is composed of the very best in the business. In order to make this project as successful as possible, we have created the **HEARTLAND JORDAN J.V.** This strategic partnership will allow us to provide the best solution to Virginia Beach City Public Schools (VBCPS). Joining our J.V. team is a talented group of designers and consultants.

Heartland Construction, Inc. provides Construction Management Services throughout Southeastern Virginia and Northeastern North Carolina. Heartland has gained recognition as one of the region's most esteemed Woman-Owned Construction firms with a consistent resume of exceptional performance. Heartland Construction will lead the team completing the Old Kellam High School Renovation and the Bettie F. Williams Elementary School new construction. Heartland Construction will act as the construction manager, accompanied by VMDO and Dills Architects as the lead designers.

W. M. Jordan Company has been in business for 63 years serving clients throughout Virginia and the Carolinas. Headquartered in Hampton Roads, W. M. Jordan has made an impact on signature projects through the region and specifically Virginia Beach, from the restoration of the Cavalier Resort to the Virginia Beach Amphitheater and the Aquarium. W. M. Jordan Company will lead the team for Princess Anne High School and Bayside High School, working with Moseley Architects, who will lead the design team.

Each team will be aided by our partners in design and consultation, expert MEP consultant, *CMTA* and expert Education consultant, *Green Schools National Network (GSNN)*. Educational Commissioner, Jennifer Seydel, has a wealth of experience in integrating the construction process into education. Taking into consideration Virginia Beach's strong CTE program and green career and engineering pathways, our buildings can become a living textbook, while the GSNN team coaches teachers and leaders on how to use the building as a teaching tool. The GSNN team completes interviews on curriculum to acknowledge where VBCPS are and where they are shifting and translates that to the design team to incorporate those elements into the project. With her support, we will focus on designing flexible learning spaces that support deeper learning; student engagement; and learning with the future in mind.

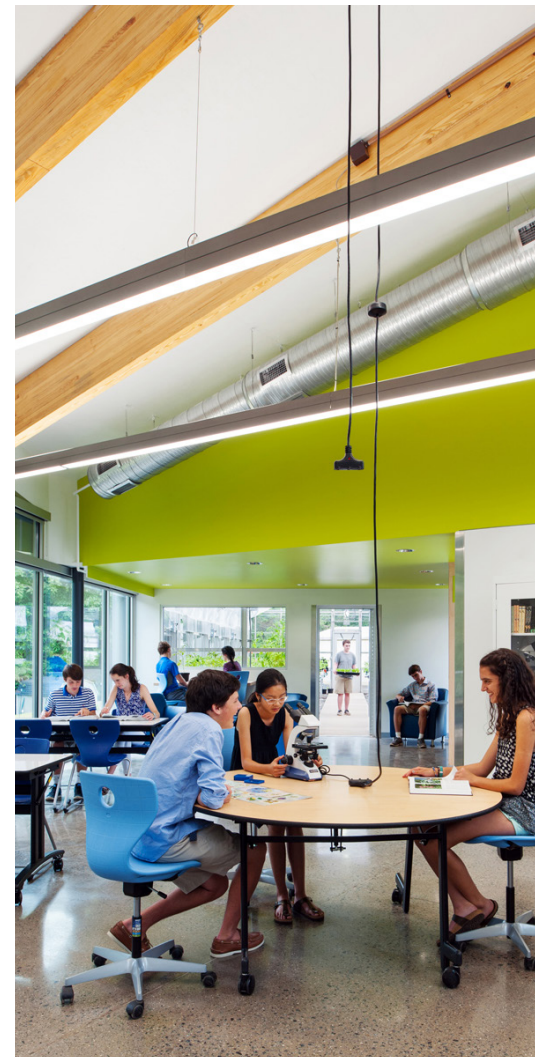
VBCPS has been a leader in the green schools movement for over 10 years. In 2015, they were the local host of the Green Schools National Conference produced by the GSNN when it was held at the Virginia Beach Convention Center. In 2016, VBCPS was the first K-12 district in the U.S. to hold an Executive Sustainability Leadership Summit facilitated by GSNN in partnership with the Chan School of Public Health at Harvard and the Center for Green Schools of the United States Green Building Council. As a member of the GSNN Catalyst Network, VBCPS has inspired other schools and school districts to follow their lead in creating sustainable and healthy learning environments and preparing students to be leaders in a complex world. GSNN has highlighted and showcased the work of VBCPS across the country at the National Association of Schools Superintendents Conference; the Green Schools Conference; and in their peer reviewed publication *The Green Schools Catalyst Quarterly*.

1. QUALIFICATIONS & EXPERIENCE



The Heartland Jordan J.V. will be the single source of responsibility to the City of Virginia Beach and VBCPS for this project. Each partner in this project has extensive experience creating top of the line educational facilities and many have a long-standing history with the City of Virginia Beach. The Heartland Jordan J.V. is committed to the success of this project, and the success of educational programs throughout Hampton Roads. W. M. Jordan and Heartland Construction are proud to be reliable companies known for delivering quality schools on time and within budget.

An organizational chart of our team make up and specific project team organization charts for each school are provided on the following pages. For company profiles and information on each team reference pages 7-136 in Section 1b in our Volume I, Conceptual PPEA Submission.



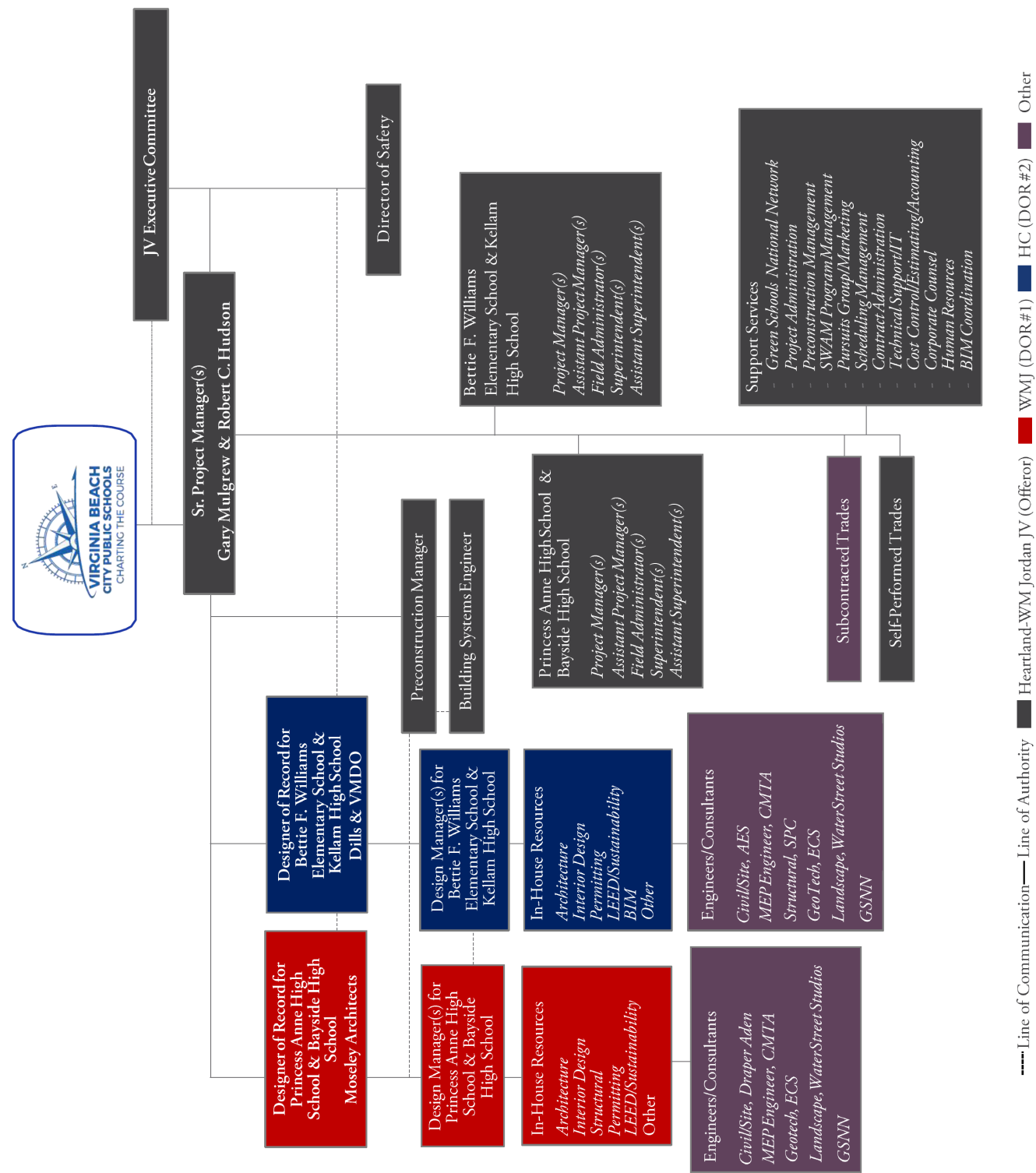
1. QUALIFICATIONS & EXPERIENCE



1. QUALIFICATIONS & EXPERIENCE



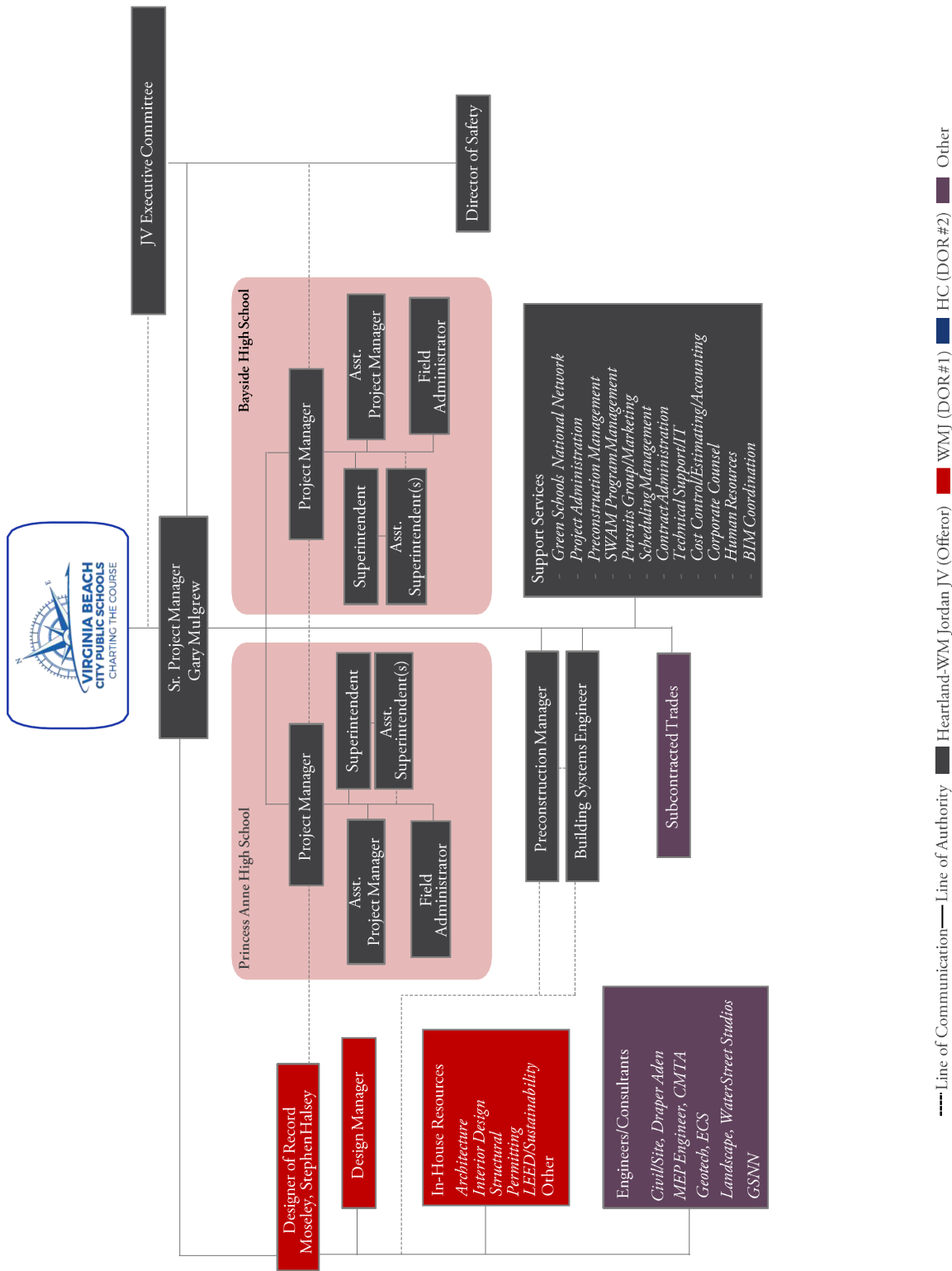
Team Organization Chart: Preconstruction



1. QUALIFICATIONS & EXPERIENCE



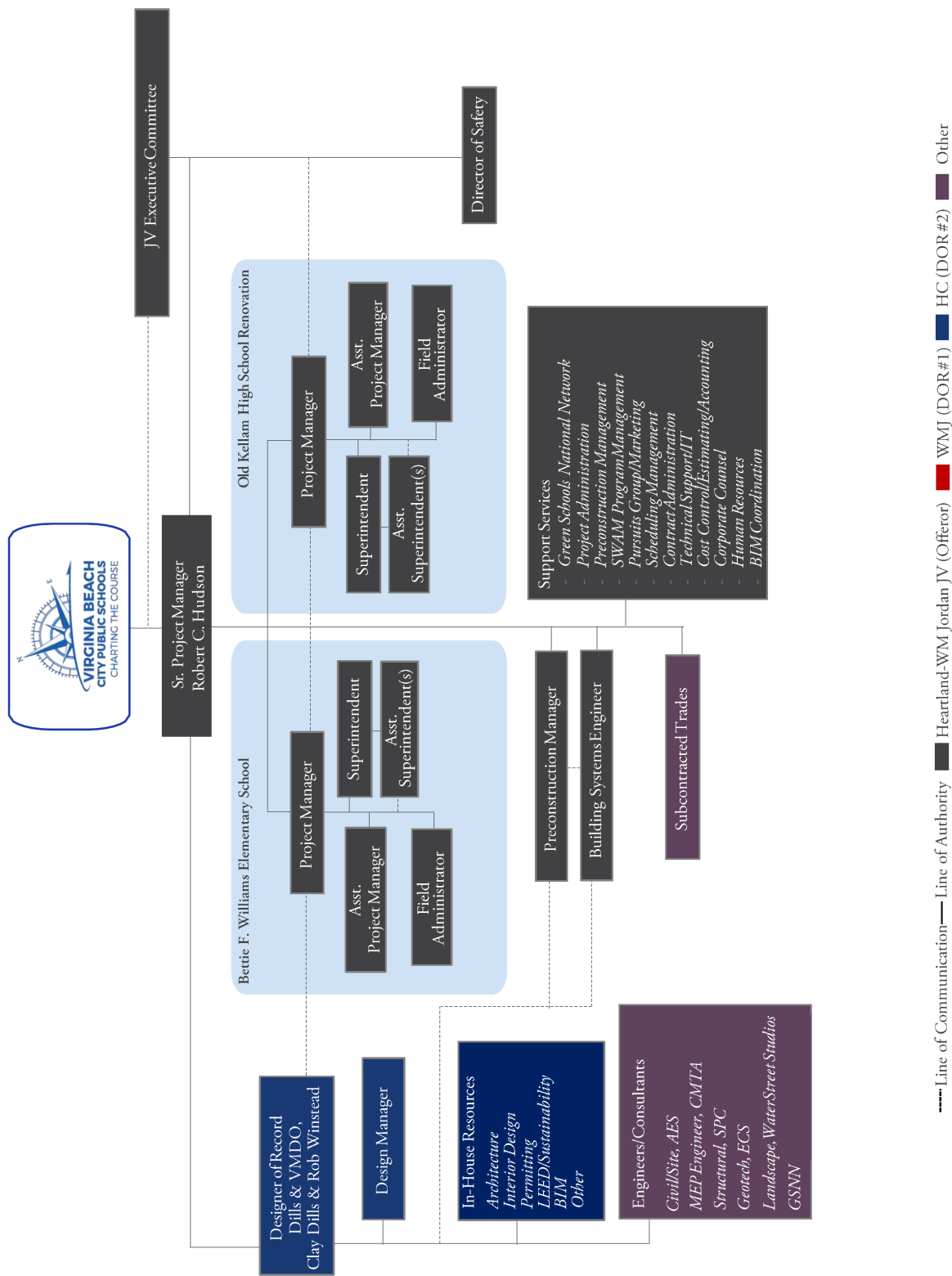
Team Organization Chart: Construction
Princess Anne High School/Bayside High School



1. QUALIFICATIONS & EXPERIENCE



Team Organization Chart: Construction
Bettie F. Williams Elementary School/Old Kellam High School Renovation



1. QUALIFICATIONS & EXPERIENCE



b. Company's financial condition. Provide supporting documentation of the Offerors current financial condition and annual reports for the past three (3) years. If the company is a privately held, supply sufficient information to document the company's financial status and capability to perform under this contract.

Please see our response to Item 1b. of this Section located in "Volume II" of this detailed proposal submission.

1. QUALIFICATIONS & EXPERIENCE



c. One page resume and qualifications of the key persons assigned to this project.

Upon award of the contract, the Successful Offeror shall provide VBCPS with a list of their key personnel including office, home, pager, and cellular phone numbers so that VBCPS can make emergency contact with the firm if necessary.

The Heartland Jordan J. V. team has provided resumes and qualifications of our key personnel assigned to the project in the Conceptual Phase PPEA submission (Volume I, Section 1b, Pages 7-136). We do not have any changes or additions to those team members that were previously submitted.

Upon award of the contract, the Heartland Jordan J. V. will provide VBCPS with a list of emergency contact personnel. The following team members are the key contacts for each firm included on our Heartland Jordan J.V. team:

Heartland Construction:

Rhonda Bridgeman - CEO
Eric Stichler - President

W. M. Jordan Company:

Ron Lauster - President
Michael Daniels - Vice President

Moseley Architects:

Stephen Hasley - Design Principal
Ron Davenport - Project Manager

VMDO Architects:

Robert Winstead - Principal

Dills Architects:

Clay Dills - Design Principal

AES Civil Engineers:

Larry Barry - Senior Principal
Mark Ricketts - Principal

Draper Aden Associates:

Tim Dean - Vice President & Principal

CMTA MEP Engineers:

Brian Turner - Principal in Charge
Lee Harrelson - Principal

Green Schools National Network:

Jennifer Seydel - Executive Director

ECS Unlimited:

David Anderson, P.E. - Branch Manager

SPC:

Carter Sinclair, P.E. - President

1. QUALIFICATIONS & EXPERIENCE



d. Offeror shall provide a concise description of its work experience as related to the specifications outlined herein. Said description should include, but not be limited to, number and types of customers Offeror has served, number of years the Offeror has been providing these types of services, references and other documentation to verify experience.

The Heartland Jordan J. V. team has provided a concise description of our work experience with firm overviews and relevant project profiles in the Conceptual Phase PPEA submission (Volume I, Section 1b, Pages 7-136). We do not have any changes or additions to the documentation that were previously submitted.

1. QUALIFICATIONS & EXPERIENCE



e. Government/School experience is preferred. A minimum of five (5) and a maximum of ten (10) references will be provided. For each reference, the name, address, and phone number along with the name of the contact person shall be given.

References for the Heartland Jordan J.V. team are listed below:

Virginia Beach City Public Schools

Don Bahlman, Staff Architect

Phone: 757-846-1671

Email: Donald.bahlman@vbschools.com

Address: 2512 George Mason Drive,

Virginia Beach, Virginia 23456

Poquoson Public Schools

Jennifer Parish, Ed.D (*Retired Superintendent*)

Phone: 757-825-6200

Email: jparish@DHCDC.org

Address: 1306 Thomas Street

Hampton, Virginia 23669

Suffolk Public Schools

Terry Napier, Director

Phone: 757-934-6206

Email: freddienapier@spsk12.net

Address: 100 N Main Street,

Suffolk, Virginia 23434

City of Newport News

Florence Kingston, Director of Development

Phone: 757-926-3804

Email: fkingston@nnva.gov

Address: 2400 Washington Ave, 3rd Floor,

Newport News, Virginia 23607

Isle of Wight County Schools

Dr. James Thornton, Superintendent

Phone: 757-357-0449

Email: jthornton@iwcs.k12.va.us

Address: 820 W Main Street,

Smithfield, Virginia 23430

Town of Blacksburg

Christopher Lawrence, Deputy Town Manager

Phone: 540-443-1000

Email: clawrence@blacksburg.gov

Address: 300 S. Main St,

Blacksburg, Virginia 24062

Chesapeake Public Schools

J. Paige Stutz, Chief Operations Officer

Phone: 757-547-0013

Email: paige.stutz@cpschools.com

Address: 312 Cedar Road,

Chesapeake, Virginia 23322

York County Economic Development

Matt Johnson, Assistant Director of Economic Development

Phone: 757-890-3306

Email: Matt.Johnson@yorkcounty.gov

Address: 224 Ballard St.,

Yorktown, Virginia 23690

York County Schools

Dr. James Carroll, Chief Operations Officer

Phone: 757-898-0300

Email: jcarroll@ycsd.york.va.us

Address: 302 Dare Road,

Yorktown, Virginia 23692

City of Norfolk

Sid Kitterman, P.E., City Engineer

Phone: 757-664-4602

Email: sid.kitterman@norfolk.gov

Address: 810 Union Street, 7th Floor

Norfolk, Virginia 23510



Volume 1

Tab 2: Project Financing

Virginia Beach City Public Schools PPEA - Detailed Phase Proposal

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2. PROJECT FINANCING



a. Cost estimates for the Core, Alternatives & Projected Savings.

For our response to item 2a. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

b. Financial Plans for the Base (Includes Updated Proposed CIP Funding (Attachment C), & Optional/Third Party Financer Quals.

For our response to item 2b. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

c. Risk Management

For our response to item 2c. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

d. Public Resources, Amounts & Conditions

For our response to item 2d. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

2. PROJECT FINANCING



e. Tax Exempt Financing

For our response to item 2e. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

f. Performance/Completion Guarantees

For our response to item 2f. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”



Volume 1

Tab 3: Project Characteristics

Virginia Beach City Public Schools PPEA - Detailed Phase Proposal

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3. PROJECT CHARACTERISTICS



a. Offerors understanding of the service to be provided, i.e. management approach

Management Approach - Collaboration

VBCPS' desire for providing new schools that support collaboration, student exploration, and career and technical curriculum will provide tremendous benefits to families, communities, and businesses in the Virginia Beach area for decades to come! The opening of each new, modern school facility demonstrates to the community a commitment on the part of VBCPS to provide state-of-the-art instructional environments for its teachers, students, and staff. Modern school facilities have been shown through numerous studies to improve student performance and teacher morale, both of which will result in this school community being attractive to families and businesses considering locating to Virginia Beach.

The Heartland Jordan J.V. team offers the Virginia Beach community a unique combination of deep local knowledge and national perspective and expertise. Local companies have a deep understanding of the place and a commitment to community priorities. National leaders bring significant expertise in community engagement and the delivery of innovative learning environments and healthy, high-performing green schools.

Continuous Community Engagement to Align Learning Environments with Your Instructional Goals

The Heartland Jordan J.V. team proposes a robust and ongoing engagement process to gather input from key stakeholders, design adaptable learning environments based on your instructional programs, test and refine core learning environments, facilitate educational commissioning for building users, and provide ongoing coaching, evaluation, and support for users as programs evolve in the new environment.

We want to hear directly from the community and stakeholders – their concerns, fears, hopes, and goals. We will listen intently and seek consensus around shared values. By garnering buy-in early on, we will build and maintain momentum that keeps spirits high and the project on track. By incorporating input from diverse groups of stakeholders and addressing multi-faceted challenges head-on, our design process will yield solutions that create meaningful places specific to each community's unique context. We aim to completely internalize and understand your goals and objectives for the present and the future and then support you as you make those goals a reality.

Our approach to gathering feedback and building consensus is based on the following priorities:

- Comprehensive inclusion of the community in the design process and not just in a perfunctory manner when a building program is being considered.
- Early establishment of a well-publicized schedule featuring collaboration opportunities among all stakeholders throughout the community.
- Soliciting buy-in through a clear and transparent visioning and design process. Consensus on the goals of the project will create common ground and provide a clear and agreed-upon framework for evaluating the program and architectural designs as they develop.
- Ongoing engagement throughout the entire design and construction process
- Professional development, educational commissioning, and professional coaching and support

3. PROJECT CHARACTERISTICS

Jenny Seydel and the Green Schools National Network will leverage their robust engagement processes, their national perspective, and their specific knowledge of instructional programs at Virginia Beach Public Schools to lead this effort and provide third-party accountability. Engagement looks different for every project, and we will work with you to design a process that meets your goals. Continuous community engagement could include:

- Community Outreach & Public Relations
- Visioning and Goal Setting
- Development of Alternative Futures / Options
- Consensus around a Preferred Future and Critical Success Factors
- Student learning opportunities throughout the Design and Construction Process
- Professional Development during the construction process
- Mock-ups of Core Learning Environments
- Building as a Teaching Tool
- Educational Commissioning
- Professional Coaching & Support
- Post-Occupancy Evaluation

Engagement During Design

Authentic and meaningful community engagement during design is critical to “getting it right”, but it’s important to recognize the additional strain that planning and capital project engagement can pose on communities impacted by the pandemic. For this reason, we are adjusting our engagement tools and processes to adapt to the current context. Synchronous engagement capitalizes on valuable time that we work together with stakeholders. This typically looks like workshops, interviews, and other forums that can be translated onto virtual platforms. We recognize that schedules are more divergent than ever so we’ve been leaning on asynchronous engagement tools to allow for more flexible, remote participation; these can include recorded focus groups, word cloud polls, site installations, and virtual town halls. Developing a toolbox of remote, asynchronous engagement tools has allowed us to engage diverse stakeholder groups that may have been otherwise unable to attend in-person, synchronous meetings. We will continue to use these techniques moving forward, even when in-person meetings are possible again, as we iterate and strive for a more equitable and inclusive engagement process.

Asynchronous:

- Camera Journaling: through video and photography, stakeholders can capture and share their perspective on their personal environments or experiences with the design team; this can reveal facets of the site that the design team would never have had the time or access to discover.



3. PROJECT CHARACTERISTICS

- **Pop-Ups & On-Site Events:** in-situ site activities are a valuable way to test early design ideas, garner interest in future development, and provide more kinetic/engaging opportunities for users who might not otherwise participate in a formal engagement.
- **Polls & Surveys:** can be used throughout the engagement process but particularly useful to validate assumptions about programming and needs by a wider pool of users.
- **Social Media Platforms:** creates a project-specific website/wiki/blog to generate excitement for the project, communicate progress, share thought leadership, and solicit feedback online.
- **Update Videos:** allow for short, regular updates of project information and ways to get involved in an easily accessible format.
- **Family Activities:** provide a way for families to learn about and engage in the design process together on their own schedule. These could include neighborhood scavenger hunts, brainstorm activities or family oral history documentation.
- **Virtual Reality Experiences:** leverage the BIM model to allow stakeholders to experience the space virtually and provide input to the design team.



Community Engagement Leveraging VR Technology

Synchronous:

- **Community-Led Walk-Throughs:** identifying a variety of users to lead site and neighborhood tours early on, whether it be through student shadowing, journey-mapping exercises or formal tours for the design team.
- **Community Advisory Committees:** a curated group of stakeholders — ideally non-decision-makers — who are established early in the design process to co-develop goals and hold the design team accountable to the broader community.
- **Visioning Workshop:** a kick-off workshop designed to identify the project vision, goals, and metrics for success to ensure alignment of the development objectives with strategic intent and design approach.
- **Town Hall & Forum:** formal or informal discussions that engage potential and current user groups to uncover perceptions, acquire feedback, and validate areas of opportunity.

3. PROJECT CHARACTERISTICS

- **Stakeholder Interviews:** one-on-one discussions to understand users' needs, values, and aspirations in relation to their environment; this process can often reveal other key stakeholders to loop in early-on.
- **Design Workshops:** a collaborative, facilitated workshop for stakeholders and user groups to build upon the research, directions, or concepts identified by the design team. These could take place in a variety of settings from an elementary school classroom to public community group meetings.
- **Paid Co-Creators:** student interns who are compensated for the knowledge, time and value they bring to the project.
- **Collaborative Curriculum:** work with educators to simultaneously design school-specific curriculum and unique learning environments that will support it.



Engagement During Construction

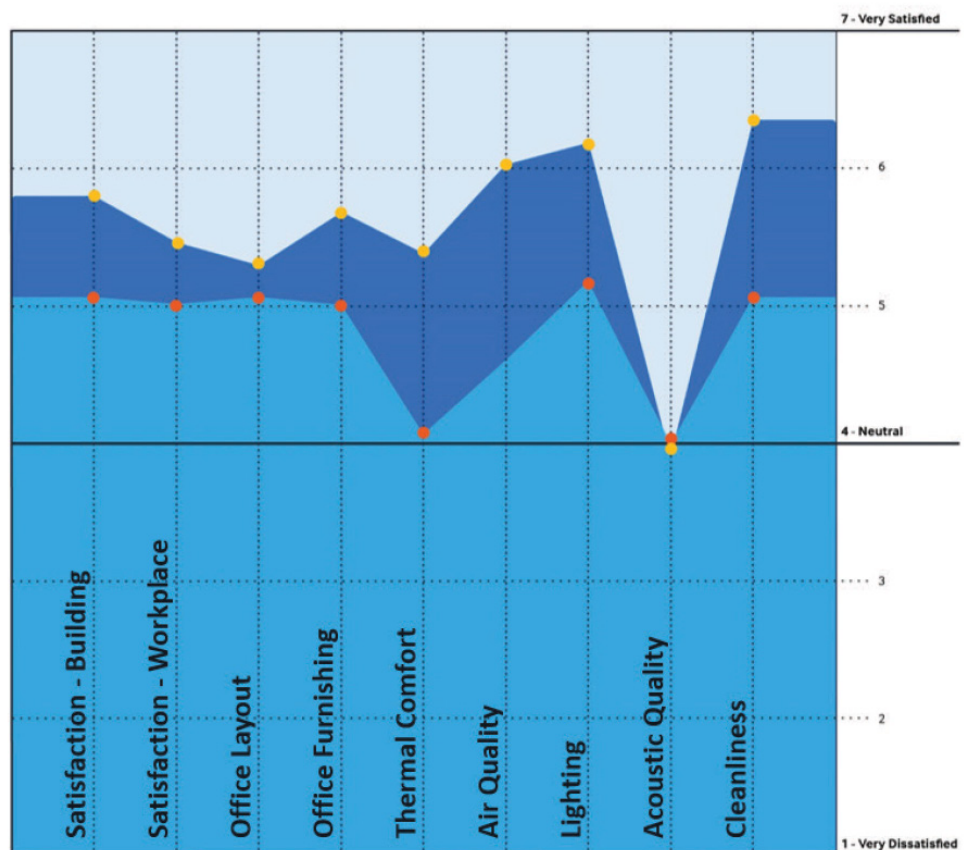
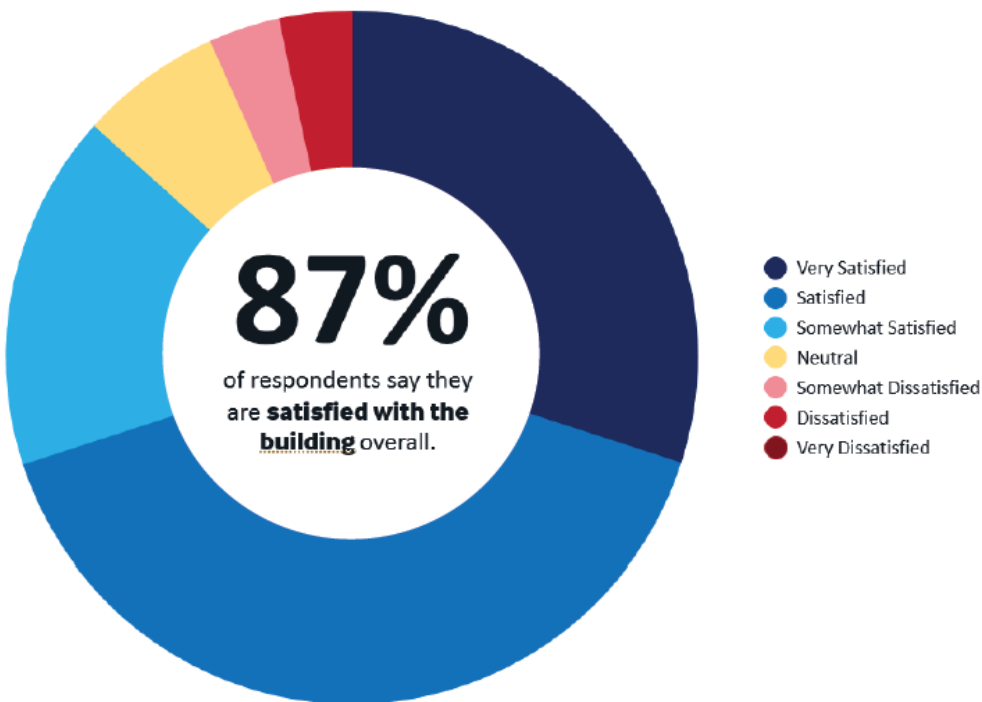
- **Project-based learning and career exposure:** Work with educators to develop project-based learning curriculum for students to learn from the design and construction process. Provide career exposure opportunities for students to engage with the design and construction team.
- **Building and Site as a Teaching Tool:** Work with educators to develop content for environmental graphics that enhance and support the curriculum and fully leverage the building and site as teaching tools.
- **Mock-ups of Core Learning Areas:** Build mock-ups of core learning areas (classrooms, labs, etc.) to allow building users to experience the space
- **Professional Development:** Schedule and lead regular professional development opportunities during construction to prepare building users for the new learning environment.

Design workshop with Educators

Engagement Following Occupancy

- **Educational Commissioning for Teachers:** To ensure a smooth transition and the best use of the new space, GSNN will provide educational commissioning as a professional development session for educators. This could include background on the design process, suggestions for how to best integrate new space to enhance their curriculum, and recommendations on how to best utilize the building and site as a teaching tool.
- **Professional Coaching:** Provide ongoing professional development and leadership coaching services to help faculty and staff “live” in the building and leverage all of the building’s resources and features.
- **Post-Occupancy Evaluation:** Work with the Center for the Built Environment to facilitate an Occupant Indoor Environmental Quality Survey, collect and summarize the data, and meet with users to review results and make adjustments where appropriate. *See the results from a previously completed Post Occupancy Evaluation on the following page.*

3. PROJECT CHARACTERISTICS



Results of Post Occupancy Evaluation

3. PROJECT CHARACTERISTICS



Management Approach - Communication

The Heartland Jordan J.V. believes the most essential part of the communication/information plan will be the coordination of communications between our Team, representatives of the Virginia Beach City Public Schools, school faculty/staff, student/parent input and the City of Virginia Beach. The Heartland Jordan J.V. will work with these representatives to develop and focus upon key expectations in the area of public relations. With Green Schools National Network (GSNN) taking the lead, we will establish guidelines for internal and external communications that facilitate the free exchange of ideas and comments so that all team members operate from the same set of principles and objectives.

All members of our JV team have a long history of facilitating public comment and support. By implementing a strategy consisting of our best practices learned through years of experience, our public involvement will be both substantive and meaningful. Our approach to communications and community outreach will create a sense of involvement that builds and maintains community support for the project.

When Virginia Beach City Public Schools selects the Heartland Jordan J.V. to implement the proposal, GSNN will make any appropriate announcements, coordinated with public relations personnel from the Public Schools, regarding the scope and intent of this important project. Further, if appropriate, key members of the JV team will be available for interviews by local media personnel to discuss the project and its development. As the project develops, members of the JV team will remain available, if necessary, to make presentations to business and community groups to report on the project's development and accomplishments. We also will provide a comprehensive and coordinated public information campaign that will reach the full range of stakeholders, including the general public, elected officials, public agencies and those employees and individuals who may be affected by this project.

In addition, members of the JV team will ensure that the public and key leaders are aware that the project is in the Public Schools' and general public's best interests. If appropriate, we will use a variety of methods to inform stakeholders and the general public about progress and developments including:

- Educational updates to provide information about the scope, timing and benefits of the project
- Tours of the facility to provide on-site illustrations of the project's benefits and progress
- Participation at local levels such as speaking opportunities and public forum events to provide updates and to describe the benefits of the project
- Digital marketing plan to give timely updates regarding the project on the Public Schools' website and associated social media outlets.

Green Schools National Network

GSNN brings an expert approach to the educational construction process, prioritizing the current and future needs of the school system in their strategy. The Heartland Jordan J.V. will work in collaboration with GSNN to ensure the end product will accurately reflect the input of the community using the buildings. It is important to know GSNN will engage each school community in the overall process so that all entities are well represented.

3. PROJECT CHARACTERISTICS

GSNN is a known leader in the green schools movement with a deep and wide network of research, as well as school and industry partners. As a partner in the project, GSNN would work with the PPEA team to leverage these resources to provide these services:



1. Community/Stakeholder Engagement. GSNN will work with the design team to create a plan for community engagement that will help them understand the current and future needs of VBCPS instructional model and vision. During this phase GSNN will facilitate a process to help the design team develop building designs that reflect the needs and dreams of the community. This process will include virtual and face-to-face seminars or summits, community workshops, design charrettes, and other community engagement processes as needed. GSNN will co-plan and co-facilitate these processes to build capacity of both the design team and the community for living into

a vision for schools that prepare students for a healthy, equitable and sustainable future.

2. Design Phase. GSNN will work with the design team throughout the design phase to address the needs of phenomenon, place, project and problem based instructional design and education for sustainability. GSNN will assist the design team to interpret the education language that is sometimes a barrier to addressing the needs of the client. Reviewing conceptual plans, technology plans, furniture and equipment needs, and outdoor landscape plans, will also be important to identify hidden needs of educators that may not have emerged in the initial ideation phase.

3. Design Development Phase: During this phase, the GSNN team will work with the VBCPS faculty and staff of the new building to create a 5-year Action Plan to support a successful transition into the new building. This will include new vision; mission statements that match the new learning environment, an operations plan that matches the sustainability features designed into the building; a redesign and refresh of the instructional model and curriculum that leverages the building as a three dimensional textbook; and systems and structures to support the health and well-being of all students, faculty, and staff.



4. Commissioning, Professional development, and ongoing support: GSNN can provide educational commissioning, professional development and leadership coaching services to help faculty and staff “live” in the building and leverage all of the building’s resources and features. These services will be designed specifically to meet the needs of the faculty and staff, to support the on-going implementation of the Action Plan developed in the Design Development Phase. This commissioning, professional development and leadership coaching will incorporate a combination of opportunities available through the district and local community and supports from the GSNN and its partners.

3. PROJECT CHARACTERISTICS



b. Social, Economic and Environmental Impacts

The proposed Virginia Beach City Public Schools project offers significant positive impacts to the Virginia Beach City Public Schools and the City of Virginia Beach.

The most exciting impact is that each new VBCPS school will embody your district's vision for the future by providing spaces where faculty can engage students in active learning that will increase student learning for decades to come. Examples include varied learning spaces so educators can offer differentiated instruction, connections to the outdoors, welcoming interior finishes and flexible furniture, project-based learning spaces, and an abundance of technology—all geared toward enhancing student outcomes. We want the new facilities to impact not only the students, but the faculty as well. By providing everyone with a supportive learning community, we want them to feel as if they've grown throughout the year – concluding the academic year feeling better than their first day of school.

With a focus on program maximization, the Heartland Jordan J.V. has a mission to create schools that will serve the City's current and future needs. With the expert work of Green Schools National Network, our goal is to build the most value into the facilities, starting at Day 1. Our team values the input of our end users, gathering data from teachers, administration, and the community through the use of site mock ups and virtual technology.

Positive Community Social Impacts

There is a direct relationship between the neighborhood school and the community in which it resides. This harmonious relationship is reinforced by modern buildings that invite learning and welcome a breadth of diversity that mirrors the community.

Providing new schools would allow students a learning opportunity centered around a School of the Future, in a building that promotes active, life-long learning in a sustainable environment. The proposed designs incorporate spaces that can be used for both education and community-based programs. These spaces include Meeting Spaces, Athletic Facilities, and the Media Center.

Throughout the design and planning phases, the respective school communities will be welcomed through various charrettes and community input sessions, to share their vision for the school as a community hub. Connecting the design to the community is a critical component of delivering a successful partnership.

In addition to input from the community on the design, our team will actively pursue participation on the construction side, to include employment opportunities for community residents, as well as subcontracting opportunities for local firms, including local minority-owned business concerns. To achieve this, our team will hold Community Engagement Sessions, designed to identify specific trade scopes and employment opportunities.

The Heartland Jordan JV have constructed the Diamond Springs and Newtown Elementary Schools, as well as the Williams Farm Park Recreation Center. The B.F. Williams School is the final piece to enhance this sector of the community.

3. PROJECT CHARACTERISTICS



Positive Economic Impacts

New schools create an economic boom in their communities. Historically, new buildings increase property values and improve overall neighborhood and community aesthetics. Residents take pride in their new surroundings, and it shows through the care in which they exert on their own piece of the community.

As neighborhoods and communities benefit from the construction of new schools, so do businesses. The school becomes the source of development. It is common for businesses to open and flourish in the vicinity of newly constructed, high quality schools.

Our team's efforts to find employment and subcontracting efforts for local residents and minority-owned small businesses translates into an influx of economic stability in the community. This initiative further builds pride in the community and a personal connection to the school building. It also keeps the money in the community through individual paychecks and business growth.

Furthermore, with the creation of employment opportunities being a goal of both city, regional, and state economic development agencies, the ability of the city to demonstrate to prospective businesses that the VBCPS is committed to supporting education can provide the City with the competitive edge it needs to attract the high quality, tax revenue enhancing economic development the City desires, and to further support the region's pro-business climate.

In addition to the local communities who will benefit from the use of these new schools, there is also an immediate and long-term economic benefit to the City and citizens of the City because of the impact from these large construction projects, spanning several years, will create numerous employment opportunities and will generate new tax revenues for the City.

Ultimately, new schools generate a positive atmosphere that impacts the residents, businesses, and the municipality with an increased economic position. Property values increase, development follows educational capacities, and the tax base increases.

Positive Environmental Impacts

VBCPS has proven a commitment to reducing carbon footprint by delivering sustainable buildings. Our design build team's culture is to not only achieve this goal but to work collaboratively with everyone to strive for areas to increase sustainable efficiencies. Our entire team is committed to this approach and has analyzed site layouts, construction materials, design efficiencies, and building modeling to reduce energy consumption while increasing building performance.

Our team includes design and construction team members that were crucial to some of Virginia Beach's milestone LEED projects, including College Park Elementary (design and construction), Great Neck Middle (construction), Pupil Transportation (design and construction), Renaissance Academy (Design-Build), and Windsor Oaks Elementary (construction). These projects include key firsts for Virginia Beach in terms of LEED success: first platinum project, first gold, and first silver.

3. PROJECT CHARACTERISTICS



Our team continues to design and deliver LEED projects and all of our partners have LEED Accredited Professionals on staff and participating in the project. We have the unique ability to design schools that use less than half of the energy of VBCPS other most recent schools and the ability to create millions of dollars of life cycle energy savings that can then be reinvested into education. Please reference Section 3d in Volume II of our Detailed Proposal submission for additional information regarding the full LEED and positive environmental impacts.

In addition to our commitment to energy efficiency, our team will address key health issues in our buildings. Indoor Environmental Quality (IEQ) is critical for the mental health, performance and general well-being of all building occupants. This is especially important in educational settings. CMTA believes that a high-performance building is one which also features extraordinary IEQ. This means that in addition to energy efficiency, great emphasis is also placed on Indoor Air Quality (IAQ) and occupant circadian health. Our design will provide levels of IAQ informed by the latest research. In addition, regularly occupied spaces will be designed such that daylight is the primary lighting source using the most effective and energy efficient technologies.

Positive Transportation Impacts

With the new schools replacements projects situated on the existing site, and construction being coordinated around the existing building's operations, there will be careful planning to ensure the safety of building occupants and visitors. Construction operations will be limited to specific areas of the site and fenced in for safety reasons. Each of the new replacement school project's traffic patterns will be carefully studied to ensure no new traffic patterns will be impacted. Coordination with the Virginia Beach Transportation Department will need to take place to ensure coordination of any small modifications that may need to occur.

In aligning with the City's strategic plan, our proposal includes shared use paths which will enable the new facility to mesh well with the existing buildings and within the overall community.

For further information related to specific site layouts, please reference Section 3d and 3g in Volume II of this detailed phase proposal submission.

Additional Positive Impacts:

- aligns with the VBCPS maintenance and operational goals;
- includes high performance strategies that reduce energy and life-cycle costs;
- addresses future enrollment growth;
- invites families to the city, which boosts the VB economy;
- retains and attracts educators and administrative personnel to VBCPS; and
- features a project delivery method (PPEA) that is faster and less expensive than traditional methods.

3. PROJECT CHARACTERISTICS



c. Property Acquisition Requirements

For our response to item 3c. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

d. Project Plans

For our response to item 3d. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

e. Schedule/Risk allocation for late completion

For our response to item 3e. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

f. Assumptions and Contingencies

For our response to item 3f. please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

3. PROJECT CHARACTERISTICS



g. Proposed Phasing

For our response to item 3g, please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

h. Accommodations for students during construction (swing space)

For our response to item 3h, please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”

i. Operations, Maintenance & Lifecycle Cost of the project.

For our response to item 3i, please refer to our Financial Proposal provided in a separate volume entitled “Volume II.”



Volume 1

Tab 4: Other Factors

Virginia Beach City Public Schools PPEA - Detailed Phase Proposal

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4. OTHER FACTORS



a. Offeror shall indicate usage of SWaM and local businesses/contractors.

The Heartland Jordan J.V. team is committed to empowering SWaM trade partners. Both Heartland Construction and W. M. Jordan Company have a proven track record of partnering with SWaM trade partners and vendors, in a manner that promotes success and opportunity. The J.V. itself is an impeccable example of a successful partnership between a SWaM firm and a larger contractor. Heartland Construction, as a certified Woman-Owned Small Business, demonstrates first-hand the capabilities of, and opportunities available to SWaM firms, while W. M. Jordan Company demonstrates the appreciation for and willingness to partner with SWaM trade partners and vendors. **This J.V. is an authentic example of a successful SWaM partnership.**

Relying on the trade partner relationships of both firms, the J.V. maintains an extensive SWaM trade partner database and outreach program. Subcontracting opportunities are identified, and scopes are tailored to align with potential SWaM firm's specific areas of expertise and construction capabilities.

The J.V. seeks genuine SWaM partnership opportunities on all projects. These efforts yield SWaM participation percentages in excess of agency-specified goals; more importantly, these efforts lead to increased overall success of the SWaM partner firms. **The value is not just in exceeding the goals; it is in developing SWaM businesses that will thrive for years to come.**

Aside from specific SWaM efforts, the J.V. is committed to developing positive working relationships with all trade partners. During the development of the Conceptual Phase, the Heartland Jordan J.V. team committed to key trade partners. While this was early in the process, the J.V. believed this approach was an ethical method to contracting and building a coalition of firms that are qualified and capable of delivering these projects.

In particular, the Heartland Jordan J.V. team focused on local SWaM trade partners that would be most critical in achieving the sustainability and energy-efficiency goals incorporated in the J.V.'s design documents. Commitment letters from these firms are included for reference to demonstrate this J.V.'s efforts in Volume II of our Detailed Phase submission, Section 4c.

For more information on the additional trade partner outreach efforts we plan to undertake on this project please see Volume I of our Conceptual Phase submission, Section 1i, pages 152-154.

4. OTHER FACTORS



b. Offeror can provide any additional amenities to the building.

Please see our response to Item 4b. of this Section located in “Volume II” of this submission.

4. OTHER FACTORS



c. If Offeror intends to subcontract any part of the work under this contract, indicate which parts and which Subcontractors

Please see our response to Item 4c. of this Section located in “Volume II” of this submission.

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Volume 1

Tab 5: Additional Information

Virginia Beach City Public Schools PPEA - Detailed Phase Proposal

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5. ADDITIONAL INFORMATION



Offer shall submit the following documents/information:

- W-9 Form
 - Contractor/Employee Background Certification
 - Virginia State Board of Contractors License
 - Virginia State Corporation Commission Registration
-

We have provided the above requested documents on the following pages for Heartland Construction and W. M. Jordan Company, Inc.

5. ADDITIONAL INFORMATION



HEARTLAND CONSTRUCTION - W-9 FORM

W-9 Form (Rev. October 2018) Department of the Treasury Internal Revenue Service		Request for Taxpayer Identification Number and Certification		Give Form to the requester. Do not send to the IRS.																																													
Go to www.irs.gov/FormW9 for instructions and the latest information.																																																	
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2 Business name/disregarded entity name, if different from above																																																	
Print or type. See Specific Instructions on page 3.	3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ▶			4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ (Applies to accounts maintained outside the U.S.)																																													
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5. ADDITIONAL INFORMATION



W. M. JORDAN COMPANY - W-9 FORM

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5. ADDITIONAL INFORMATION



HEARTLAND CONSTRUCTION - CONTRACTOR/EMPLOYEE BACKGROUND CERTIFICATION

4. CONTRACTOR BACKGROUND CERTIFICATION FORM

In a contract for services to be provided on School Board property or any property at which a school sponsored event takes place, the Contractor certifies that neither the Contractor nor the Contractor's employees, agents, subcontractors or subcontractors' employees who will have direct contact with Virginia Beach City Public Schools ("VBCPS") students while performing such services have been convicted of a felony or any offense involving the sexual molestation or physical or sexual abuse or rape of a child. The Contractor may require the above listed individuals to personally certify this information but the Contractor will be responsible for submitting such certifications to the School Board. The certification requirement will be binding throughout the term of the contract and Contractor has a continuing duty to inform the School Board of any event that renders the certifications untrue. The Contractor certifies that it has procedures in place to inform its employees, agents, subcontractors or subcontractors' employees of these requirements. Certifications with materially false statements may constitute reason to terminate the contract and may subject the person certifying the information to criminal prosecution.

- Contractor represents that none of its employees who will be in the presence of VBCPS students have been convicted of a felony or an offense involving the sexual molestation or physical or sexual abuse or rape of a child.
- Contractor will obtain a Background Certification from all present and future employees and update VBCPS of any felony convictions and any convictions for offenses involving the sexual molestation or physical or sexual abuse or rape of a child.
- Contractor has established a process to maintain compliance with the terms set forth in this Contractor Background Certification and will provide verification to VBCPS on request.

Contractor's signature on this form indicates that Contractor is deemed to have provided the certification described herein.


Contractor's Signature

Eric M. Stichler

Printed Name

President

Title

Heartland Construction, Inc.

Company

4120 South Military Highway

Business Address

Chesapeake, Virginia 23321

March 3, 2022

Date

5. REQUEST FOR TAXPAYER ID NUMBER AND CERTIFICATION –

5. ADDITIONAL INFORMATION



W. M. JORDAN COMPANY - CONTRACTOR/EMPLOYEE BACKGROUND CERTIFICATION

4. CONTRACTOR BACKGROUND CERTIFICATION FORM

In a contract for services to be provided on School Board property or any property at which a school sponsored event takes place, the Contractor certifies that neither the Contractor nor the Contractor's employees, agents, subcontractors or subcontractors' employees who will have direct contact with Virginia Beach City Public Schools ("VBCPS") students while performing such services have been convicted of a felony or any offense involving the sexual molestation or physical or sexual abuse or rape of a child. The Contractor may require the above listed individuals to personally certify this information but the Contractor will be responsible for submitting such certifications to the School Board. The certification requirement will be binding throughout the term of the contract and Contractor has a continuing duty to inform the School Board of any event that renders the certifications untrue. The Contractor certifies that it has procedures in place to inform its employees, agents, subcontractors or subcontractors' employees of these requirements. Certifications with materially false statements may constitute reason to terminate the contract and may subject the person certifying the information to criminal prosecution.

- Contractor represents that none of its employees who will be in the presence of VBCPS students have been convicted of a felony or an offense involving the sexual molestation or physical or sexual abuse or rape of a child.
- Contractor will obtain a Background Certification from all present and future employees and update VBCPS of any felony convictions and any convictions for offenses involving the sexual molestation or physical or sexual abuse or rape of a child.
- Contractor has established a process to maintain compliance with the terms set forth in this Contractor Background Certification and will provide verification to VBCPS on request.

Contractor's signature on this form indicates that Contractor is deemed to have provided the certification described herein.

Contractor's Signature

Michael L. Daniels

Printed Name

Vice President

Title

W. M. Jordan Company, Inc.

Company

11010 Jefferson Avenue

Business Address

Newport News, VA 23601

3/14/2022

Date

5. REQUEST FOR TAXPAYER ID NUMBER AND CERTIFICATION –

5. ADDITIONAL INFORMATION




HEARTLAND CONSTRUCTION - VA STATE BOARD OF CONTRACTORS LICENSE



COMMONWEALTH of VIRGINIA
Department of Professional and Occupational Regulation
9960 Mayland Drive, Suite 400, Richmond, VA 23233
Telephone: (804) 367-8500

EXPIRES ON
03-31-2023

NUMBER
2705150102

BOARD FOR CONTRACTORS
CLASS A CONTRACTOR
***CLASSIFICATIONS* CBC HVA RBC**


HEARTLAND CONSTRUCTION INC
4120 S MILITARY HIGHWAY
CHESAPEAKE, VA 23321



Mary Bros-Vaughan, Director

Status can be verified at <http://www.dpor.virginia.gov>



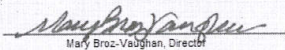
(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

DPOR-LIC (02/2017)

5. ADDITIONAL INFORMATION




W. M. JORDAN COMPANY - VA STATE BOARD OF CONTRACTORS LICENSE

COMMONWEALTH of VIRGINIA	
Department of Professional and Occupational Regulation	
EXPIRES ON 10-31-2023	9960 Mayland Drive, Suite 400, Richmond, VA 23233 Telephone: (804) 367-8500
NUMBER 2701004636	
BOARD FOR CONTRACTORS CLASS A CONTRACTOR *CLASSIFICATIONS* CBC	
	W M JORDAN COMPANY INCORPORATED PO BOX 1337 NEWPORT NEWS, VA 23601
	
 Mary Broz-Vaughan, Director	
Status can be verified at http://www.dpor.virginia.gov	

(SEE REVERSE SIDE FOR PRIVILEGES AND INSTRUCTIONS)

DPOR-LIC (02/2017)
(DETACH HERE)

COMMONWEALTH of VIRGINIA	
Department of Professional and Occupational Regulation	
CLASS A BOARD FOR CONTRACTORS CONTRACTOR	
CLASSIFICATIONS CBC NUMBER: 2701004636 EXPIRES: 10-31-2023	
W M JORDAN COMPANY INCORPORATED PO BOX 1337 NEWPORT NEWS, VA 23601	
	(FOLD)
Status can be verified at http://www.dpor.virginia.gov	

DPOR-PC (02/2017)

5. ADDITIONAL INFORMATION



HEARTLAND CONSTRUCTION - VA STATE CORPORATE COMMISSION REGISTRATION

State Corporation Commission Form

Virginia State Corporation Commission (SCC) registration information. The offeror:

☒ is a corporation or other business entity with the following SCC identification number: F191985-3 -OR-

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust -OR-

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Offeror's out-of-state location) -OR-

☐ is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

****NOTE**** >> Check the following box if you have not completed any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals (the Commonwealth reserves the right to determine in its sole discretion whether to allow such waiver): ☐

5. ADDITIONAL INFORMATION



W. M. JORDAN COMPANY - VA STATE CORPORATE COMMISSION REGISTRATION

State Corporation Commission Form

Virginia State Corporation Commission (SCC) registration information. The offeror:

☒ is a corporation or other business entity with the following SCC identification number: 0079512 -OR-

☐ is not a corporation, limited liability company, limited partnership, registered limited liability partnership, or business trust -OR-

☐ is an out-of-state business entity that does not regularly and continuously maintain as part of its ordinary and customary business any employees, agents, offices, facilities, or inventories in Virginia (not counting any employees or agents in Virginia who merely solicit orders that require acceptance outside Virginia before they become contracts, and not counting any incidental presence of the offeror in Virginia that is needed in order to assemble, maintain, and repair goods in accordance with the contracts by which such goods were sold and shipped into Virginia from Offeror's out-of-state location) -OR-

☐ is an out-of-state business entity that is including with this proposal an opinion of legal counsel which accurately and completely discloses the undersigned Offeror's current contacts with Virginia and describes why those contacts do not constitute the transaction of business in Virginia within the meaning of § 13.1-757 or other similar provisions in Titles 13.1 or 50 of the Code of Virginia.

****NOTE**** >> Check the following box if you have not completed any of the foregoing options but currently have pending before the SCC an application for authority to transact business in the Commonwealth of Virginia and wish to be considered for a waiver to allow you to submit the SCC identification number after the due date for proposals (the Commonwealth reserves the right to determine in its sole discretion whether to allow such waiver): ☐

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