



QA &

Q 1: What are the fees?

A 1: The fees charged by Windamere are evaluated on a per project basis. It is relative to the project size, scope of work, and difficulty of the project. There are many ways to structure fees such as a straight fee basis, a fee basis with a bonus schedule, or fee basis with profit and cost savings share. We have successfully structured deals for our clients under each scenario. An example would be the [Roeser Park Project](#). We negotiated a straight fee per unit, on the 16 unit project, with a bonus schedule. The fee was based on the complexity of the homes. There is one fee charged on every job and that is 3% of the hard construction costs.

Q 2: How much experience you have in infrastructure (Streets, pavement etc.)?

A 2: We have a vast and sweeping knowledge of the horizontal construction of projects - we have undertaken these projects on residential and commercial levels. We have taken many projects that start out as a concept design, and progress them to finished units. What this means is that we not only worked with engineers to design the project, we installed the infrastructure and built the residential units or commercial buildings.

Infrastructure items that we have responsibility for include:

- Survey
- Staking
- Rough Grading
- Main Sewer Trunk Lines
- Sewer Services
- Manholes
- Main Water Trunk Lines
- Water Services
- Wet Taps
- Fire Hydrants
- Electrical Lines
- Electrical Services
- Telephone
- Gas
- Cable
- Concrete Curb & Gutter
- Concrete Approaches & Crossings
- Sidewalk
- Street Lights
- Gate Access Systems
- Retaining Walls
- Masonry Walls
- Mailbox Systems
- Survey Monuments
- Street Signs
- Sub-Grade Application & Pavement
- Landscape Community Facilities such as Pools, Spa, Ramada & Clubhouse

With all of the items mentioned above we completed private testing and coordinated with the appropriate city inspectors upon completion. We also have had an A-12 contractor's license for pipeline installation.

Past projects that we have completed infrastructure improvements on include:

- Rancho Palo Verde Estates
- Broadway San Marcos
- The Barton House Assisted Living Facility
- Jacks Plant Palace
- Merrill Ranch
- Red Mountain Aviara
- The Springs Units 4 & 5
- Days Inn Rosecrans
- And many more throughout California and Arizona

A few references of horizontal infrastructure jobs, and others that we have done:

Mr. Thomas Daly
Vice President
M & T Bank
1 (480) 763-2446 – Office
Mr. Daly is the area representative for M & T Bank in Arizona & Idaho

Mr. Jeff Evershed
Division President
M & T Bank
1 (503) 603-2571 - Office
Mr. Evershed is the Division President for the Western United States

Mr. Steve Edmiston
Vice President
Washington Trust
1 (480) 473-0278 – Office

Mr. Edmiston is the Vice President of Arizona for Washington Trust

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I wholeheartedly recommend Windamere Construction. I have banked them since 1994. They have always completed their projects on time and within budget. I have also used them to build out troubled bank owned projects. They have been a pleasure to do business with.

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*Steven Edmiston,
Vice President of Arizona,
For Washington Trust*



Q 3: Do you do forensics and engineering to make sure the work was done correctly and to limit liability?

A 3: As a general rule on homes that have been started and not finished, we like to walk and inspect the homes before any work is started or bid out. If plans are available we will review the plans and check for any deficiencies. If the plans are not available we will try to locate them for review. A review will be done with the appropriate city to check the inspection reports - ensuring that all inspections have been completed by the city up until the progress point the home is at. An on site meeting is scheduled, with the area inspectors that have worked on the project, so that we may get a handle on what has happened on the project in the past. If we feel that there are any problems beyond the normal scope, an outside engineer or inspection service will be engaged to give an opinion on what needs to be done to fix the problems.

We completed a project called Roeser Park that was similar to this scenario. We took over nine semi-finished homes, six framed units, and one that was still at the pre-pour inspection.

Q 4: Is the forensics/engineering done internally or externally?

A 4: It is our experience that, if the proper protocol has been followed with the city building and development departments, most of the issues that arise can be handled in house. If there is a problem that arises out of our scope of expertise then a third party would be brought in to assist with the issue.

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Windamere Construction has outstanding customer service. They take care of everything from start to finish. It's so great to work with a construction company that is honest, hard working, on time and on budget.

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*Thomas Daly,
Vice President at M&T Bank*



Q 5: What bill payment application do you use?

A 5: We use Buildsoft for our billing system and track it with a spread sheet that allows us to audit the work. An invoice is created by our software system and includes two types of invoices. One is a general invoice that describes the work being billed for and breaks the work down line item by line item.

Each line item is billed at the rate agreed upon and summary totaled at the end. The items are billed only when a subcontractor or vendor submits their invoice for payment. The second invoice is a detailed invoice which takes the initial invoice and breaks it down into more detail.

Sample invoices are available from our Business Development Director so you may review what is being described.

Q 6: How is billing done?

A 6: The billing is done in an extremely detailed format. A meeting is set up for whatever the billing cycle is for the job. This usually occurs once a month and takes place during a weekly job meeting, as is normally set up with the customer. At each billing cycle a 'Billing Book' is created for the customer. The billing book contains all of the information of what has transpired financially on the job for the previous month.

The items in the book include:

- Any job site records such as permits or city fees paid
- Any invoices that were received and processed during that cycle
- Conditional Subcontractor / Vendor lien waivers for the current period
- Unconditional Subcontractor / Vendor lien waivers for the previous billing period
- An invoice summary sheet with invoice and amount subtotaled
- An invoice for the work in the period we are billing for
- A detailed invoice for backup
- An audit spread sheet for each job independently for your review that breaks down and tracks the billing from the first draw until the job is completed
- Each job is billed independently

Sample reports are available from our Business Development Director so you may review what is being described.



Q 7: What about the development service side?

A 7: We are able to handle any development project that you may have for us to complete. Over the years we have achieved a strong reputation in the west as a quality contractor - this allows us to have access to the premiere subcontractors in the valley. As owners, we take a hands-on approach to every project worked on, and treat it with the same level of care and consideration - as if it were our own. We work closely with city officials, engineers, and subcontractors to value engineer your project and not waste your money – while achieving quality work!

Q 8: What about your construction loan management?

A 8: We can manage construction loans through the Buildsoft System.

Q 9: How do you handle indemnities - liability & risk for partially constructed projects - regarding the prior contract etc.?

A 9: In the past we have asked for an indemnification from the owner on all work that is completed up to the starting point. Generally we are made the contractor of record by the city when we take care of the permits. We carry liability insurance. A copy of our certificate is available for your review.

Q 10: I want to make sure you will not be going out of business. So, I would like to see your financials P & L.

A 10: We can provide those for your review.

Q 11: What is your billing cycle: 30 day cycle or 15 day cycle?

A 11: Our typical billing cycle is thirty days. Once a month the client will be given a billing book for services rendered, and payment is due within thirty days, preferably when the next billing book is presented.

Q 12: Do you have advance permit fees?

A 12: If it is possible that the city allows the contractor to pay for the permit fees ILO the owner, then yes we will pay for the permits when we picked up. They will be billed to the customer on the first billing cycle for payment.

***Quality -
on time,
on budget!***



Q 13: Will you assume all warranties after project is complete and manage the process?

A 13: We can provide a walk through and homeowner orientation to the customer upon the owners' request. It is our general rule to warranty any work that has been completed by us or our representatives. Work that was done previously, and is not in the scope of our contract, will be billed at a rate of \$65 per hour plus materials. Typically we don't have warranty issues and I would encourage you to talk to Mr. Daly (see page 2) about his experience he has had with us regarding warranty work.

Q 14: How quickly can Windamere get the bids done and back to us?

A 14: This is a difficult question since it is a general question that depends on the details of the project. If it is a new project, from scratch, it can take around two weeks to get the numbers put together. If it is a project that is under construction, we can usually have the numbers back within seven to ten days. In order to prepare a proper bid we need a complete set of working drawings and specifications. The material selections will be presented to the customer before the start. The customer will be able to review the bids and make selections before the work is started. This way the customer can feel confident in the product that they are receiving.

Q 15: What is your process, from the beginning of the bid process to returning the bid?

A 15: Once the documents are received and we start the process we can inspect existing units and meet the subcontractors on site. Any research that needs to be done on the project can start. A 'Project Book' is started which includes all of the pertinent job information and bids. As the bids come in they are scanned into our Alchemy filing system which gives us instant access to the bids. A database is set up for the project and the bid information is entered so that we can compare subcontractor pricing through generated reports. Once the proper amount of bids is received we can then start to negotiate terms and price.

Q 16: I would like bids from three different sub-contractors, is it possible?

A 16: This is possible but it slows down the process significantly. Typically we have a good grasp on subcontractor / vendor pricing with two bids. If we feel those numbers are out of line with where they should be we solicit others.



Q 17: How many projects have you had in AZ total?

A 17: We have completed the following Arizona projects:

- Rancho Palo Verde Estates – Residential Subdivision (Planning, Infrastructure, Horizontal Construction & Sales)
- Broadway San Marcos – Residential Subdivision (Planning & Infrastructure)
- The Barton House Assisted Living Facility – Commercial Assisted Living Center (Infrastructure & Horizontal Construction)
- Jacks Plant Palace – Commercial General Sales Building (Infrastructure & Horizontal Construction)
- Merrill Ranch – Residential Subdivision (Planning, Infrastructure, Horizontal Construction & Sales)
- Red Mountain Aviara – Residential Subdivision (Infrastructure, Horizontal Construction & Sales)
- The Springs Units 4 & 5 – Residential Subdivision (Infrastructure, Horizontal Construction & Sales)
- American Self Storage – Self Storage Facility (Planning, Infrastructure, Horizontal Construction)
- Settlers Point – Residential Subdivision (Horizontal Construction & Sales)
- Western Skies – Residential Subdivision (Horizontal Construction & Sales)
- The Muirlands – Residential Subdivision (Planning)
- Ironwood & Pima – Residential Subdivision (Planning)
- Roeser Park – Residential Subdivision (Horizontal Construction)
- Langley Estates – Residential Project (Planning)

To find [more information and pictures](http://www.windamereconstruction.com), please visit our website at **www.windamereconstruction.com**

Q 18: Can you handle both scenarios - a) Blow & go jam out? b) 2-3 units a month - spoon feed?

A 18: We work well with both scenarios. The object to Roeser Park was a quick turnaround schedule completing the sixteen units in under three months from the start date. Nine were completed in less than one month and the remaining five were completed, from rough frame, in approximately eight weeks. The last unit has not been built yet due to customer needs. They were started in two separate phases do to job constraints. The typical build time of a new entry level unit is 75 - 90 days from the permit. A spoon fed project, where you are getting a consistent amount of starts, runs the same general amount of construction time. We do not waste time in the construction process since we feel it is better to not let units sit still and not be worked on.

Q 19: Will the units be ready to be sold- cleaned etc.?

A 19: The units will be completely ready for move in when completed. They will have city finals, be cleaned, pre-punched and ready for customer showings and move in.

Q 20: Will the homes be FHA qualified?

A 20: We have built hundreds of homes in the valley following the FHA guidelines for materials and have never had a problem meeting their standards. All of the homes that are built should be qualified for FHA certification by the materials we use.

Q 21: What names has the company been under since Mr. O'Brien started in the business? Please include license numbers.

A 21: Catalina Land Development, LLC - License Number 140653 KB-01
Windamere Construction, LLC - License Number 229145 KB-01

Q 22: How quickly we can get moving with the proposal around and back?

A 22: We can start the process as soon as we have project information and details. Work can start as soon as we are given the go ahead from the customer.

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