

**BLOCK**  
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# PRESENTS

On Track To  
**COWAN PLACE**  
Senior Living • Fort Worth, Texas

# Senior Living • Fort Worth, Texas

# GETTING READY TO SUCCESSFULLY BID

December 17, 2020

# December 17, 2020



# Agenda |

- I. Introductions
- II. Overview of Project
- III. What Should I Do Now To Prepare?
- IV. What To Expect When Bid is Announced.
- V. Reviewing The Bid Package
- VI. Checklist for Completing The Bid Package
- VII. Awarding of Subcontracts
- VIII. Q&A



# BLOCK TEAM |



**Deirdre Barrett**

Director of Diversity, Inclusion & Marketing  
BLOCK Companies

[dbarrett@blockcompanies.com](mailto:dbarrett@blockcompanies.com)

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# BLOCK TEAM |



**Amanda LeBlanc**

Director of Compliance | BLOCK Companies

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# BLOCK TEAM |



**Licia A. Green**  
Partner | Waterman Steele

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## **II. Overview** | **Cowan Place Senior Living**

- **Block is committed to the historic STOP SIX neighborhood.**
- **Cowan Place is Phase 1 of STOP SIX Choice Neighborhood Initiative (CNI)**
- **Involves replacement of Cavile Place Public Housing Community**
- **\$35 Million HUD CNI Grant awarded in April 2020**
- **Located at Stalcup and E. Rosedale**



# Cowan Place East Rosedale



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**PARTNERS**  
ARCHITECTURE + INTERIORS + PLANNING

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# Stalcup and East Rosedale

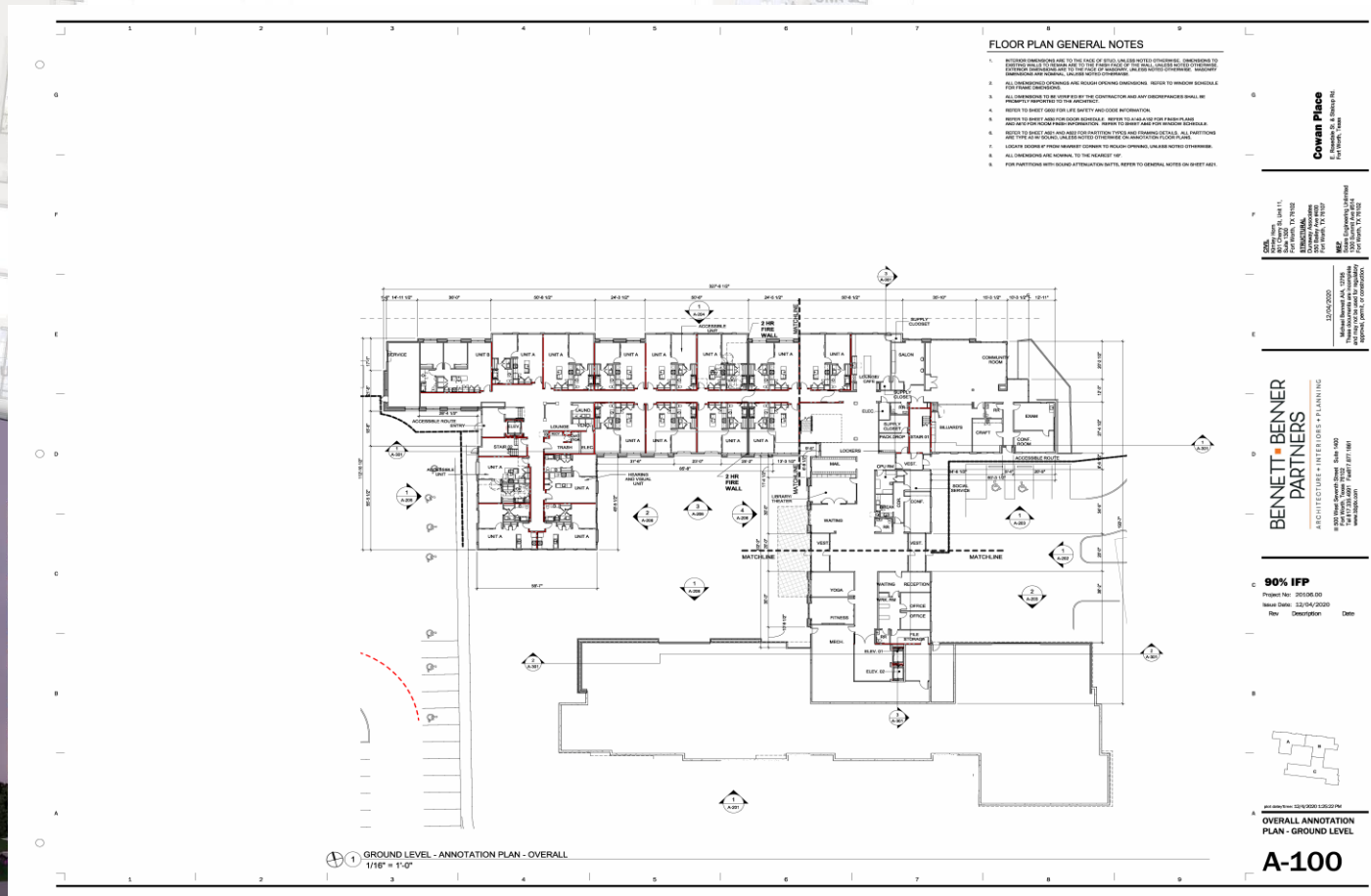


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PARTNERS  
ARCHITECTURE + INTERIORS + PLANNING

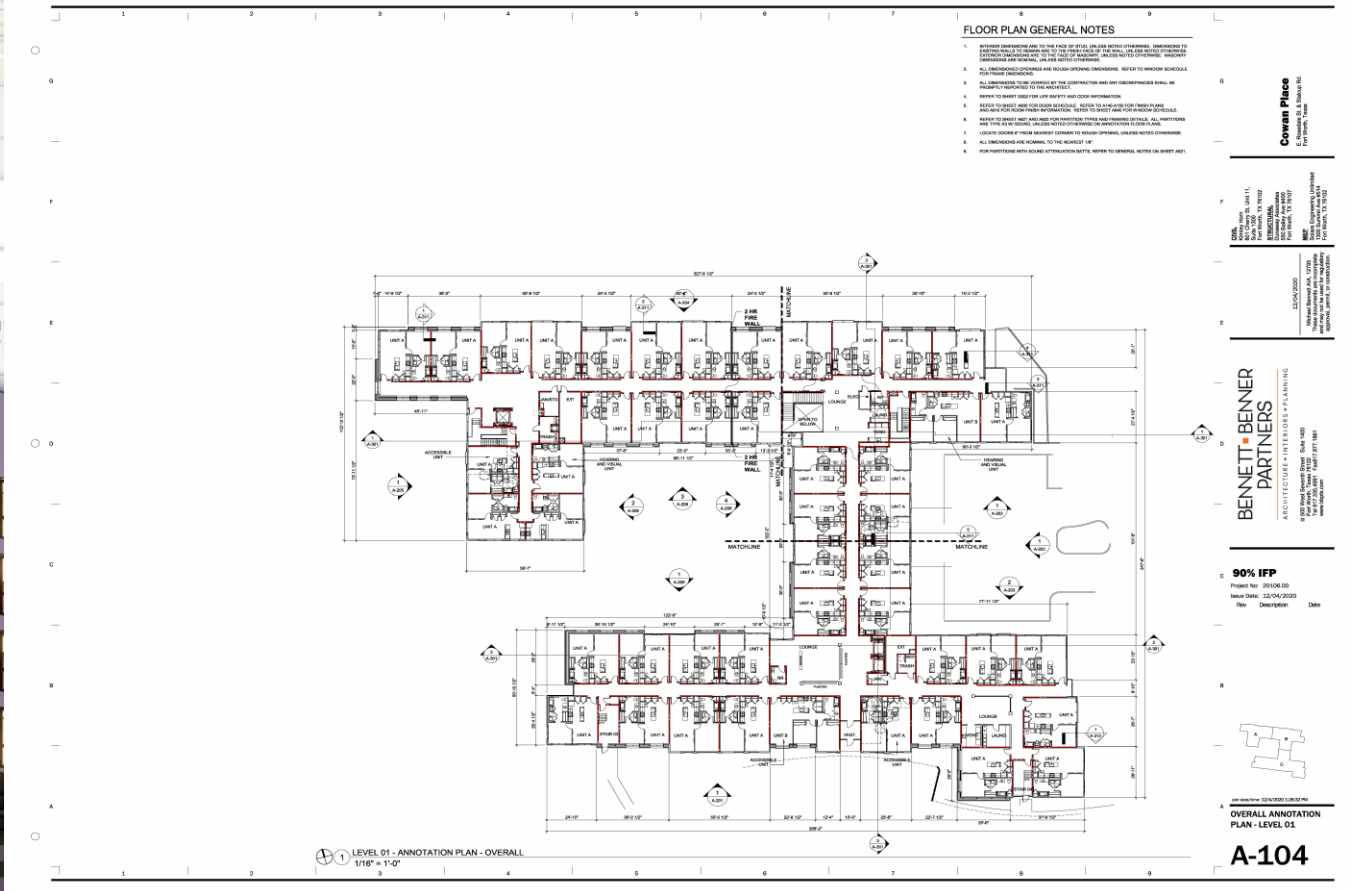
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# Cowan Place | Ground Floor



## Cowan Place | First Floor





# Cowan Place | Second/Third Floor

## FLOOR PLAN GENERAL NOTES

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**Cowan Place**  
1000 Cowan Place  
Austin, TX 78702

**ARCHITECT**  
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**90% IFP**  
Project No: 201004.00  
Issue Date: 12/04/2020  
Rev: Description Date

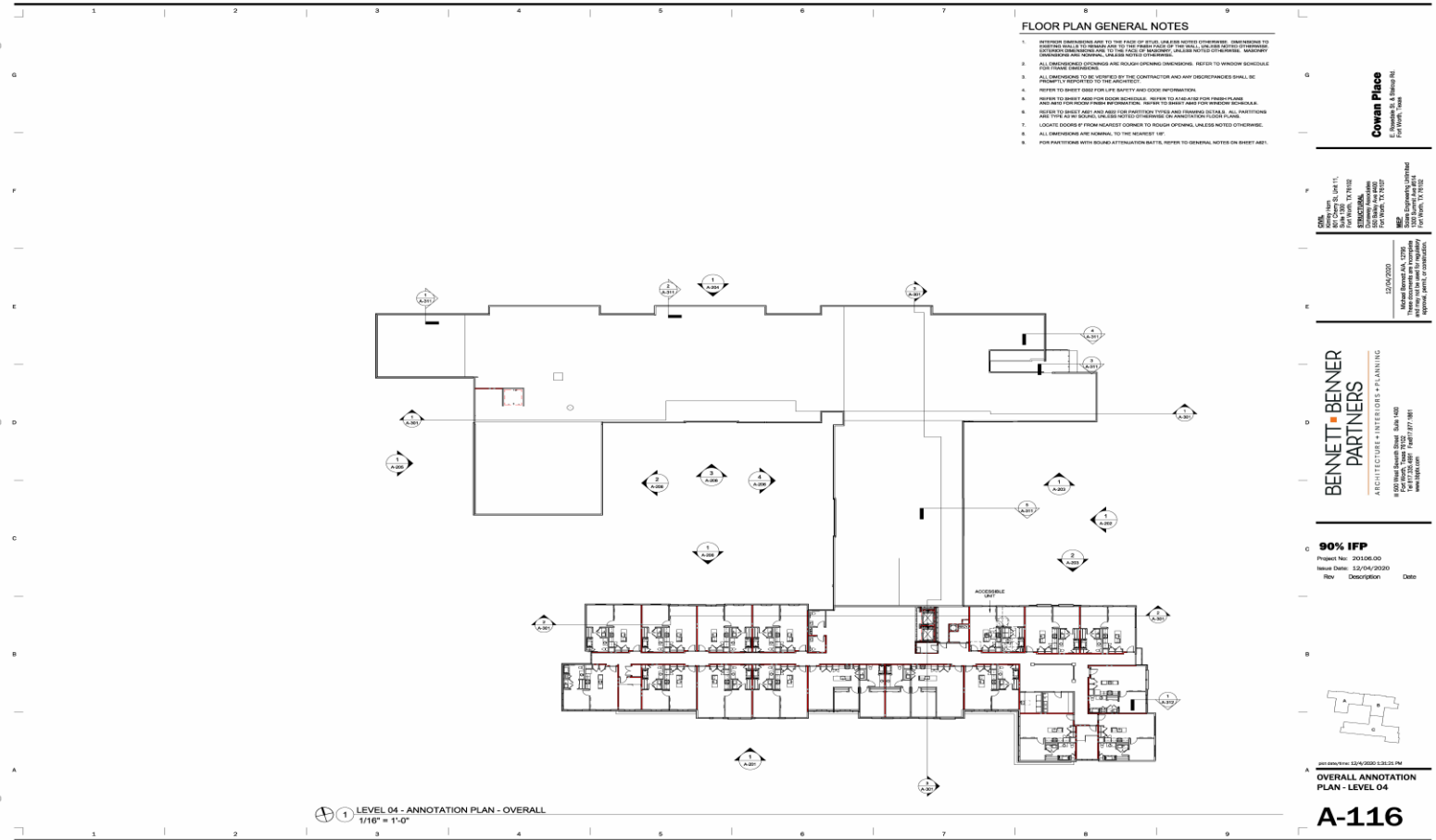
**OVERALL ANNOTATION PLAN - LEVEL 02**

**A-108**

LEVEL 02 - ANNOTATION PLAN - OVERALL  
1/16" = 1'-0"

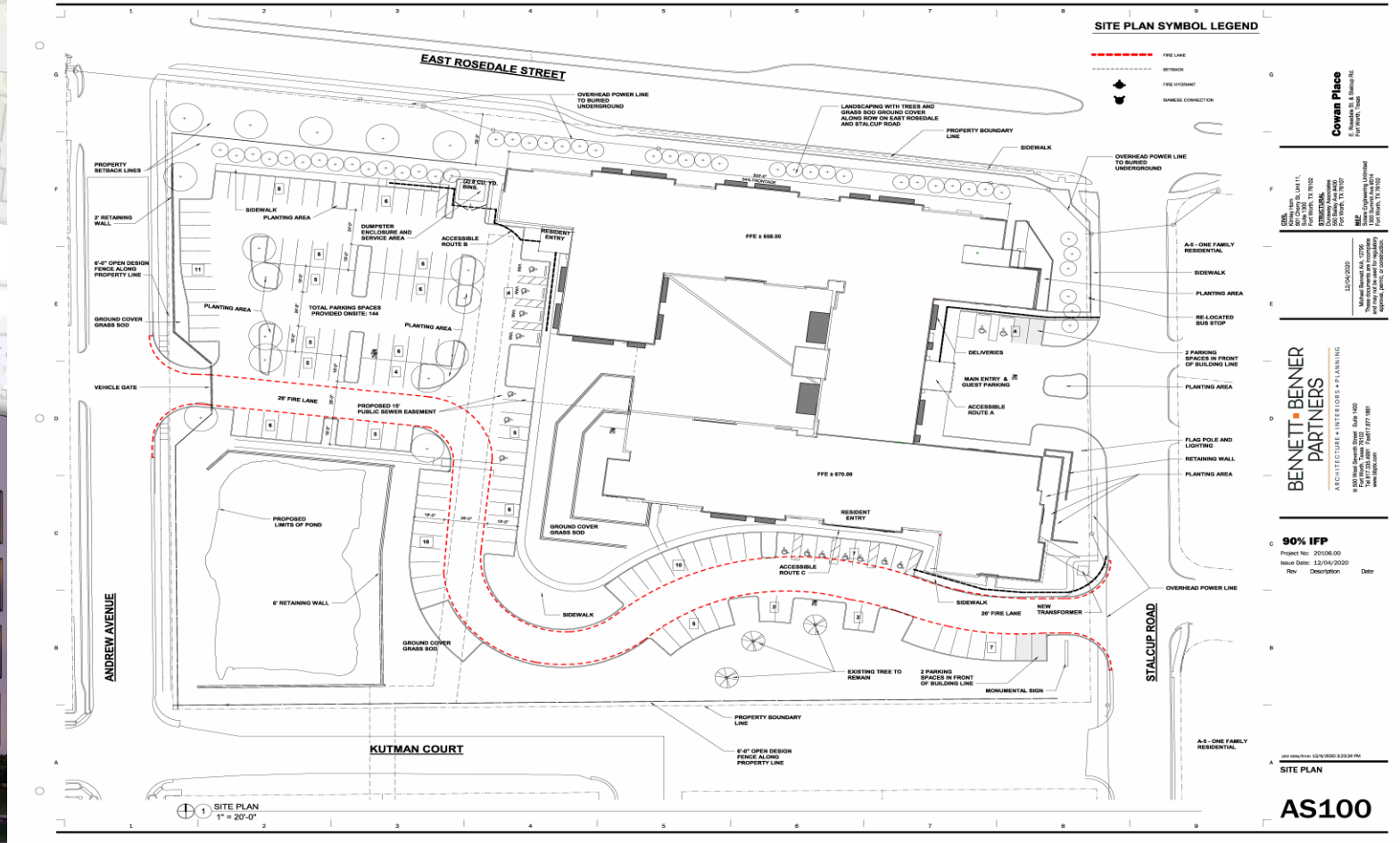
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# Cowan Place | Fourth Floor





# Site Plan



# Public Project Bidding |

- Public Construction Projects are Awarded to the Bidder who **Qualifies to Requirements and Specifications** of the Project
- Possesses **Skills and Resources** to Fulfill it
- AND Offers the **LOWEST RESPONSIVE, RESPONSIBLE BID** among All Other Bidders.

**What is the  
PROTOCOL?**



# Contracting Goals |

## MWBE:

- **25% construction contracts** (on site subcontractors)
- **15% non-construction contracts** (photographers, surveying, cleaning, etc.)

## Section 3:

- **10% construction contracts**
- **3% non-construction contracts**
- **30% new hires**
- **Any subcontract \$100,000 or more** must abide by the Section 3 hiring requirements as indicated.

# Certifications for Fort Worth |

There are **(3)** Fort Worth **Certifications** that can provide you with expanded business opportunities.

1. **WBCSW** | Women's Business Council Southwest
2. **DFW MSDC** | Dallas Fort Worth Minority Supplier Development Council
3. **NCTRA** | North Central Regional Certification Agency
4. If you **do not** have a certification, please **contact one of these certifying entities** to determine how to get certified.



# III. What Should I Do Now to Prepare?

1. Complete the **Subcontractor Information Form**.
2. Check your **Insurance and Bonding Minimums**.
3. Identify a **Compliance Liaison** from your company.
4. **Advise your vendors and suppliers** that you will begin asking for quotes
5. Complete your **Profile on ISQFT.com**
6. Get to know the **BLOCK Pre-Construction Team**.
7. Know and Understand **Multifamily Construction and Affordable Housing**.



# Subcontractor Information Form |

- BLOCK considers this form an **important first step in building our relationship with subcontractors.**
- This form can be found on **Fort Worth Housing Solutions website and through BLOCK Google Doc link.** We can also email the link to you upon request.
- All subcontractors **need to complete the entire form.**
- The question, “**Do You Have Multifamily Experience?**” is important.
- BLOCK would prefer that subcontractors have multifamily experience.



# Subcontractor Information Form |

**BLOCK BUILDERS** Subcontractor Information Form Fort Worth [Exhibit A]

All subcontractors are required to complete this questionnaire. This form must be filled out completely.  
Return completed form to: [info@blockcompanies.com](mailto:info@blockcompanies.com)

Application Date: \_\_\_\_\_ Do you have Multifamily Experience? Yes No

**Background**

Company name	Type of company	Type of work Performed
Street Address	Phone number	Fax Number
City/State/Zip	Contact Name	Email address
Year business was established	States we do work in	Previous name of company (if applicable)
Contractor's License #, if applicable	D&B #	Union Non Union

**Safety**

Please check if your Company implements the following safety controls:

Has a written safety program.	Yes	No
Has an implemented drug screening policy for all employees		
Performs safety orientation and training for all employees		
Performs continuing safety education for all employees		
Does your Company provide OSHA 10 training?		
Does your Company provide OSHA 30 training?		
If not, is your Company willing to provide OSHA 10/ 30 training, if necessary?		

**Certification**

Please check if your Company has any of the following certifications:

Qualified minority business AND/OR Section 3 certified business?	Yes	No
If yes, select certification: SBE WBE SBE Section 3 Choose one, if applicable: NCTPCA DFW MSDC WBSC		
Does your Company utilize apprenticeship programs?		
If no, is your Company willing to utilize apprenticeship programs, if necessary?		
(YES for any of the above, attach proof and/ or certifications to pre-qualification form.		

**Compliance**

Is your Company familiar with the following?

Davis Bacon Wage Rates?	YES	NO	BDG Now?	YES	NO
Certified Payroll?	YES	NO	Section 3 labor goal requirements?	YES	NO
CPTracker?	YES	NO	MWBE goal requirements?	YES	NO
Has your Company done work on a HUD funded project that required certified payroll within the past 2 years?				YES	NO
Does your company provide health insurance for all employees working 30 or more hours weekly?				YES	NO
If no, is your Company willing to provide health insurance to these employees during a specific project?				YES	NO
Compliance officer Contact	Phone number	Email address			

Page 1 of 2

1. General
2. Safety
3. Certifications
4. Compliance
5. References
6. Insurance
7. Bonding

**BLOCK BUILDERS** Subcontractor Information Form Fort Worth [Exhibit A]

**Schedule**

Provide summary of the 3 largest projects completed	Location	Start/ Completion	Amount

**Bonding Information**

Please provide the following bonding information:

Can you provide a Performance Bond?	YES	NO	Bond Rating	Bonding Capacity
Single Project	Aggregate		Bond Cost (% or \$/1000)	
Name of Bonding company	Contact		Phone Number	
Last type of bond issued	Date		Amount	

**Banking Information**

Please provide financial references:

Name of current bank	Contact	Phone Number
Line of credit	Amount	

**References (The below references may be contacted by Block Builders for verification purposes)**

Please provide 3 client/ supplier references:

Company name	Contact	Phone Number
Company name	Contact	Phone Number
Company name	Contact	Phone Number

How did you hear about Block Builders, LLC?

I hereby certify that to the best of my knowledge, the information submitted herein, including any attachments, is true and sufficiently complete so as not to be misleading. By executing this document, I acknowledge, accept and agree that this form and the information supplied herein, will be shared with the Fort Worth Housing Solutions, as well as, consultants, developers and other entities doing work with and for the Stop Six development.

Completed by: \_\_\_\_\_ (Print or Type) \_\_\_\_\_ (Signature)

Title: \_\_\_\_\_ Date: \_\_\_\_\_

If you intend to work with Block Builders, LLC's, it is essential that you return the documentation. This document should not be construed to constitute a commitment, or a request to perform any work.

page 2 of 2

# CERTIFIED PAYROLL |

**Certified Payroll** and **Davis Bacon** wage rates reported weekly on LCPTracker.

If you hire or outsource an employee to handle all certified payroll and compliance forms, do not forget to include this in your bid.

## Compliance Requirements:

- ✓ Certified Payroll – **Weekly**
- ✓ Compliance Forms - **Monthly**
- ✓ B2GNOW - **Monthly**

## Compliance Requirements |

## B2GNow |

- Platform for reporting payments between BLOCK and subcontractors. BLOCK pays net 30 days and will be reported into B2GNow for approval by the subcontractor every month.
- There may be additional monthly documentation requirements that may be needed on this project.



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This card acknowledges that the recipient has successfully completed:

### 10-hour Construction Safety and Health

This card issued to:

Trainer Name

Date of Issue

# OSHA 10 |

Although OSHA 10 cards aren't required, BLOCK highly recommends that all subcontractors obtain them.

## See below for online options and prices to get OSHA 10 certifications:

- OSHA.com | 10 Hour Construction | Online - \$89.00
- OSHAoutreachcourses.com | 10 Hour Construction | Online - \$55.00

Please verify current pricing on the websites.

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# Check Your Insurance & Bonding Minimums |

- All Subcontractors **must carry the minimum insurance** requirements.
- If you don't currently have the following insurance requirements, then please **contact your insurance agent** for the cost to increase your limits to the required limits.
- There **should be no out-of-pocket cost** to you from your insurance agent for this estimate.

- You need to **add the additional cost of the insurance to meet BLOCK minimum insurance requirements** to your bid.
- Sub-Subcontractors **coverage must be as broad** as that of the Subcontractors
- Our Acceptance of **a certificate with deficient coverage does not constitute a waiver** of any coverage requirement





# General Liability:

**\$1,000,000 Occurrence, \$2,000,000 General Aggregate, Products and Completed Operations Aggregate: \$2,000,000**

- a. Primary/Non-Contributory Endorsements in favor of Holder
- b. Waiver of Subrogation, Blanket or Specific.
- c. Subcontractor must name "Block Builders, LLC" as Additional Insured

# Workers Compensation:


- a. Statutory Coverage in the State of Texas.
- b. Employers Liability \$1,000,000/\$1,000,000/\$1,000,000

# Automobile Liability:

- a. \$1,000,000 Combined Single Limit
- b. Scheduled or Blanket Waiver of Subrogation
- c. Primary Non-Contributory wording
- d. Names "Block Builders, LLC" as Additional Insured

# Umbrella Liability | \$1,000,000

- Certificate must state Umbrella is Excess over GL, Auto, and Workers Comp Employers Liability


**CERTIFICATE OF LIABILITY INSURANCE**

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Producer Name Producer Address City State Zip		<b>CONTACT NAME:</b> Agent's Name Phone (A/C No. Ext.) Agent's Phone FAX (A/C No.) Agent's Fax <b>EMAIL ADDRESS:</b> Agent's Email <b>INSURANCE AFFORDED COVERAGE</b> INSURER A: Insurance Company Name INSURER B: Insurance Company Name INSURER C: Insurance Company Name INSURER D: Insurance Company Name INSURER E:	
<b>INSURED</b> Insured Name Insured Address City State Zip			

COVERAGES		CERTIFICATE NUMBER:		REVISION NUMBER:	
THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR UNDERLYING WRIT OR SUBJECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY FUND CLAIMS.					
LINE	TYPE OF INSURANCE	ADDL. CODE	CODE	POLICY NUMBER	LIMITS
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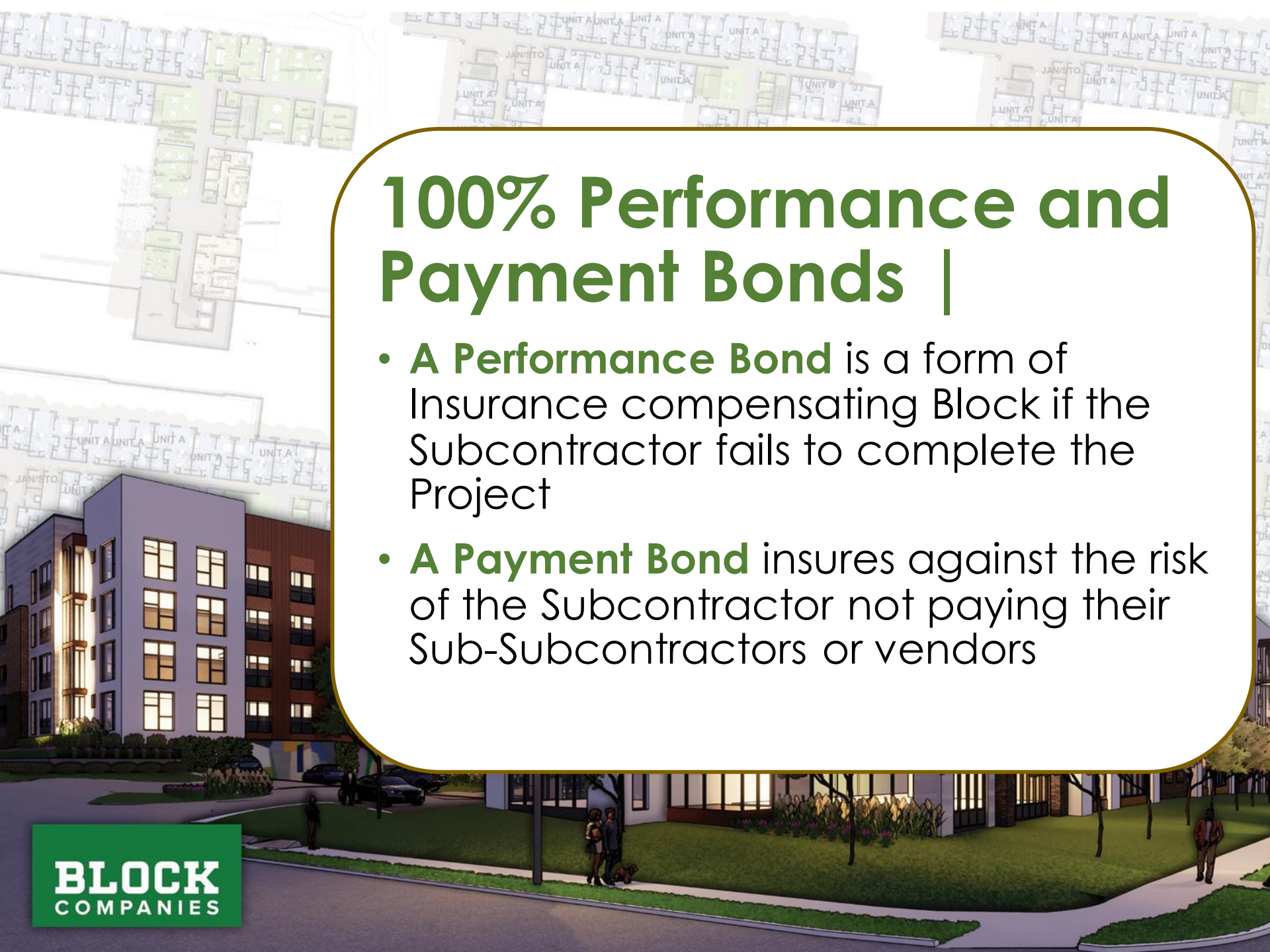
**DESCRIPTION OF OPERATIONS, ACTIVITIES, PRODUCTS AND SERVICES (PLEASE PRINT):** (Additional Remarks/Endorsements may be attached if more space is required)

Holder is Additional Insured on Comprehensive General Liability (CGL) CG 2010 1105 OR CG 2010 1106 AND CG 2017 1105 OR CG 2017 1106 AND CG 2017 1107 OR CG 2017 1108 AND CG 2017 1109 (A-13) CGL policy does not include Contractual Liability Endorsement (CG 24 34) or Amendment of Insured Contract Definition (CG 24 38). Primary/Non-Contributory Endorsement is favor of Holder on Auto, CGL, and Umbrella. Waiver of Subrogation Endorsement is favor of Holder on CGL, Workers Comp., Auto and Umbrella. Umbrella Follows form on CGL, Auto, and Employers Liability. Taxes is shown as an Insured State in Item 3A and 2C of the Worker's Compensation policy.

<b>CERTIFICATE HOLDER</b> Block Builders, LLC 619 Jefferson Highway, Suite 20 Baton Rouge, Louisiana 70806	<b>CANCELLATION</b> SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE:
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# 100% Performance and Payment Bonds |

- **A Performance Bond** is a form of Insurance compensating Block if the Subcontractor fails to complete the Project
- **A Payment Bond** insures against the risk of the Subcontractor not paying their Sub-Subcontractors or vendors



# Identify a Compliance Liaison from Your Company |

- **Understand the Compliance Reporting Requirements**
- **Review your Capacity for Compliance**
- **Complete Compliance Forms required by the City of Fort Worth.**



# Advise your Vendors/Suppliers of Your Request for Estimates |

- **Discuss material pricing** and any possible fluctuations in pricing.
- **Discuss locking in a price** for the duration of the job if BLOCK provides you a Letter of Intent.
- **Evaluate your manpower, equipment and materials** to be sure you can build the job in the timeframe noted in the bid documents.
- **18 months is the overall duration of the project**, a detailed schedule will be provided with the bidding documents.
- **Evaluate your financial capacity** to assure you can fund the project.



# Complete your Profile on ISQFT.com |

- Create a Free Profile
- One-Time Registration
- Simplify your access to BID Invitation
- ITB – Invitation to BID
- Validate your Email Address
- Complete Your Profile
- View the Project!



## IV. What to Expect When Bid is Announced

1. Bid Package Delivery and Due Date
2. You will receive a bid invitation through digital platforms. Accounts are free!
3. Get Ready to Attend Pre-BID Conference
4. View Bid Announcement Communication
5. Expect upfront to deliver BLOCK Project Success



## Bid Package Delivery |

- Bid Package link will also be available on Fort Worth Housing Solutions Website
- Bid Package link will be available on the City of Fort Worth Website
- BLOCK will send Bid Package upon Request





# Prepare for Pre-Bid Conference |

## Why Should You Attend:

- **To Learn**
- **To Set Expectations**
- **To Gain Clarity** and Get More Bid Details and More Specifics
- **Hear directly from the General Contractor on the Cowan Place Project**
- **Get a Sense of What BLOCK is looking for in your Bid Submission**



# Cowan Place BID Announcement Communication Plan |

- Bid will be Advertised and “Announced” Broadly and Widely to Six County Area in DFW including:

*Tarrant, Dallas, Denton, Parker, Wise and Johnson*

- Outreach will include: Trade, Business Advocacy and Chamber Organizations
- Legal Announcements in All Major DFW Print Publications-General and Target Markets
- E-Blasts and Social Media



# Cowan Place BID Timing |

- **December 17 & January 7** | BLOCK Bidding Webinars
- **Mid-January** | Cowan Place BID Announced - Package Distributed via ISQFT
- **Mid-January** | Cowan Place Bid Advertised in legal section of major print media across 6 DFW counties – *Tarrant, Dallas, Denton, Parker, Wise and Johnson*
- **Late-January** | Cowan Place Pre-BID Conference
- **Early February** | **Cowan Place BID Due Date**

# V. Reviewing the Bid Package

- 1. Read, Review and Discuss** the Drawings and Specs by CSI Divisions and Specifications.
- 2. Download all applicable documents** associated with your SOW.
- 3. Be prepared to discuss Scope of Work** with BLOCK to ensure accuracy of your bid.
- 4. Submit timely detailed Bid** with inclusion/exclusions on or before determined bid date.



# CSI Divisions & Specifications |

## COWAN PLACE - ESTIMATOR RESPONSIBILITIES

ITEMS	SPEC SECTION	SCOPE OF WORK
1		Temporary Fences
2		Dumpsters
3		Temporary Toilet
4		Final Cleaning
5		Erosion Control
6		Termite Treatment
7		Surveying
8	02 00 00	Earthwork
9	02 44 00	Drainage
10	02 26 00	Concrete Paving & Sitewalks
11	02 76 10	Striping
12	02 27 00	Site Utilities
13	02 90 00	Landscape & Irrigation
14	03 30 10	Concrete Foundation
15	03 38 00	Post-Tensioned Concrete
16	03 23 00	Retaining Wall
17	03 54 00	Concrete Topping
18	03 54 00	Gypsum Underlayment
19	04 20 01	Concrete Unit Masonry
20	04 21 00	Brick Masonry
21	05 40 00	Structural Steel
22	05 50 00	Metal Fabrications
23	06 10 00	Framing Carpentry
24	06 17 54	Wood Trusses
25	06 18 00	Glued Laminated Structural Units
26	06 20 00	Finish Carpentry
27	06 30 00	Millwork/Countertop
28	07 10 00	Membrane Waterproofing
29	07 13 00	Sheet Membrane Waterproofing
30	07 14 00	Fluid Applied Waterproofing / Deck System
31	07 16 00	Crystalline Waterproofing
32	07 20 00	Building Insulation
33	07 30 00	Roofing
34	07 72 00	Metal Panel
35	07 61 00	Metal Awning
36	07 46 20	Fiber Cement Siding (Panel)
37	07 46 46	Fiber Cement Siding

ITEMS	SPEC SECTION	SCOPE OF WORK
38	07 62 00	Flashing and Sheet Metal
39	07 81 00	Applied Fireproofing
40	07 81 23	Intumescent Fireproofing
41	07 84 00	Firestopping
42	07 90 00	Sealant and Caulking / Wall Flashing
43	07 95 13	Expansion Joints / Cover Assemblies
44	08 10 15	Exterior Doors
45	08 20 00	Interior Doors
46	08 30 00	Overhead Coiling Doors
47	08 40 00	Windows
48	08 50 00	Glazing
49	08 60 00	Finish Hardware
50	09 10 00	Stucco
51	09 20 00	Sheetrock
52	09 30 00	Flooring
53	09 40 00	Ceramic Tile
54	09 50 00	Painting
55	10 20 00	Apartment Specialties
56	10 55 00	Postal Specialties
57	10 80 00	Miscellaneous Specialties
58	11 30 00	Domestic Appliances
59	11 02 00	Security/Audio Video/Low Voltage
60	11 03 00	Control Access
61	12 01 00	Window Treatment
62	13 02 00	Pergola
63	14 01 00	Elevators
64	15 01 00	Plumbing
65	15 02 00	Water Submeter
66	15 03 00	Fire Suppression Sprinklers
67	15 04 00	HVAC
68	16 01 00	Electrical
69	16 51 00	ERRC - Prewire only
70	16 51 00	Fire Alarm
71	16 13 00	Lighting Fixture

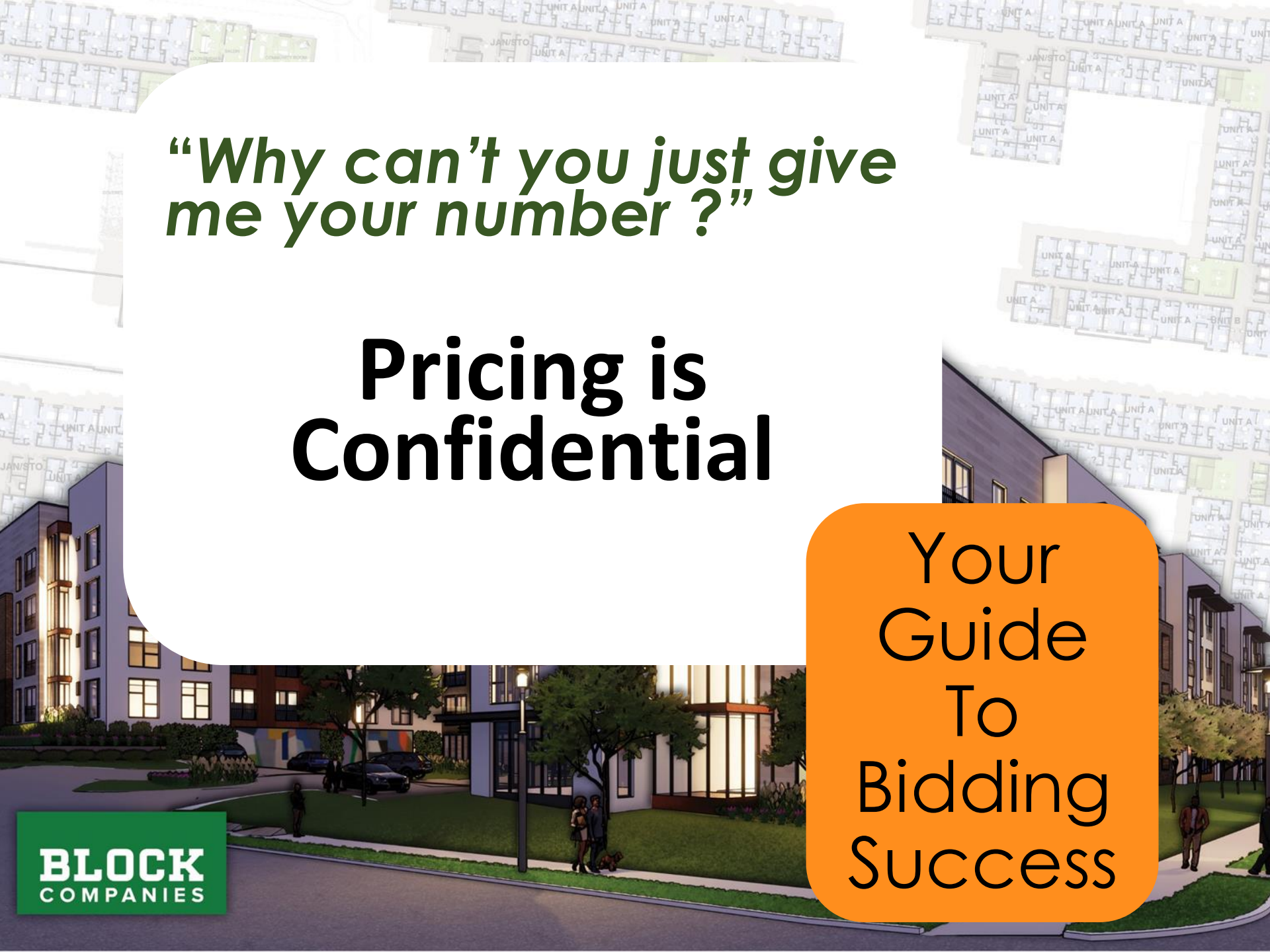
### ESTIMATOR RESPONSIBILITIES

Adrian Villarreal
Hien Ngo
Bryan Oquendo
Sen Smith

# Specific Trades |

- There are **specific trades** that will **require prior multifamily experience**:
  - Framing, Sheetrock/Finishing, Painting, Mechanical, Electrical, Plumbing and Fire Sprinkler.
- We **require prior experience** on these specific trades **because of the critical impact** that they have on the project.





***“Why can’t you just give me your number?”***

# **Pricing is Confidential**

**Your  
Guide  
To  
Bidding  
Success**




**BLOCK**  
COMPANIES

# VI. Checklist for Completing the BID Package

It is **important for subcontractors to review all addendum and project notifications** thoroughly sent throughout the bidding process. Monitor emails sent from Block regarding the project.

- 1. PROJECT OVERVIEW** | Do you have a basic understanding of the overall project and how your scope fits in?
- 2. PROJECT SCHEDULE** | Do you understand your specific durations? and How long will it take to complete your SOW? and How does your SOW affect the project schedule?





**3. MANPOWER** | Have you identified manpower requirements and included them in your proposal?

**4. PROJECT MANAGEMENT** | Do you have staff dedicated to payroll, full-time supervision, pay applications, etc?

**5. ACHIEVABLE** | Does your team have the resources to perform your SOW?

**6. COMMUNICATION** | Does BLOCK have your accurate contact information?

**7. CERTIFICATIONS** | Have you included your certifications?

**8. INSURANCE** | Have you included BLOCK minimum Insurance requirement?

**9. COMPLIANCE ACKNOWLEDGEMENT FORM** | Did you sign the acknowledgement form?

**10. SIGNATURE** | Did you sign your bid proposal?

# VII. Awarding of Subcontracts

You have Completed the Following:

- ✓ Submitted your bid
- ✓ Returned calls
- ✓ Responded to the estimator's questions in a timely manner

What's Next?

Here is what you can expect from Block:

- Will receive **two follow-up letters**:
  - 1st** - will thank you for submitting the Bid
  - 2nd** - will either be you are on the shortlist or your bid was unsuccessful.
- The **response window will vary from two weeks to two months** to get to award stage.
- If you are awarded the contract, we will say **Congratulations and we look forward to you joining the BLOCK family** on this project. We will also have ongoing communication with you.



# Timeline of this BID Process |

- 1. Bid Submitted to BLOCK**
- 2. Auto Response Letter – Thank you for Your BID**
- 3. Estimating and Compliance Acceptance of Bid by SCOPE Section**
- 4. Bid Deadline**
- 5. Estimating Team reviews Your BID**
- 6. Response Letter #2 –Your Bid Has Been Short Listed or Your Bid was Unsuccessful.**
- 7. Letter of Intent indicating that you have been awarded**



# Questions & Answers