

Balfour Beatty

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Newport Beach, CA 92660
p. (949) 502-4000
e. alert@balfourbeattyus.com
www.balfourbeattyus.com



Culver City USD | **Robert Frost Performing Arts Center**



San Diego USD | **Hoover High School Theater**



Newport-Mesa
Unified School District

Newport- Mesa
Unified School District
2985 Bear Street,
Costa Mesa, CA 92626

Response for Request for Proposal/Qualifications
Lease-Leaseback Services for

Estancia High School Theater Project



1.

EXECUTIVE SUMMARY

William S. Hart Union High School District
Canyon High School Performing Arts Center

Balfour Beatty

1. Executive Summary

Balfour Beatty is thrilled and appreciative to have the opportunity to submit the Request for Proposals / Qualifications for our the Estancia High School Theater Project. Our project team understands and values the school's mission Estancia High School's shared mission is ***"to ensure that all students demonstrate high academic achievement and sustain successful post high school pursuits. To accomplish this mission, Estancia will maintain an ethical, nurturing and challenging learning environment."***

Balfour Beatty is one of the top K-12 builders in California, and having ***successfully partnered with over 115+ local California K-12 school districts***, and similar successes across the country, we have been recognized by ABC National as ***#1 in Education Construction***. By partnering with Balfour Beatty, you are bringing on a full-service firm with an immense amount of K-12 experience, leveraged from among the best K-12 practices across the U.S., and has all the necessary resources, expertise, and cutting-edge approaches to your project.

Our project team will treat you as if you are our only client and provide you with the utmost respect and care. Our team members will be there to serve at the highest level and do whatever it takes to successfully complete the Estancia High School Theater Project. It is with great enthusiasm that Balfour Beatty submits our response to your RFP for Lease-Leaseback Services for Newport-Mesa Unified School District.

We will be flexible and bring real project solutions, efficiencies, cutting-edge technology, and customized approaches that will suit NMUSD's needs for the Estancia High School Theater Project. We have ***successfully completed 30+ Theaters/Performing Arts Centers*** in Southern California. We are also proud of our successful track record, having completed an industry leading ***235+ K-12 Lease-Leaseback projects***. Our partnership approach to these best value projects and others has led to nearly ***90% of repeat school district work***. This percent speaks volumes about our client advocacy approach to all of the projects we build.

We have proposed a proven and experienced team that will bring you project solutions and proactive results. This proposed team brings excellent communication skills and will remain transparent with information to ensure that the district is kept informed in advance of any issues that arise. We will continuously verify that our team stays aligned with the project and stakeholder goals to ensure we exceed your expectations.

Our approach to the Estancia High School Theater Project is based on the realization that the satisfaction of our clients and partners are the entire basis of our success. Our proposed and support staff, their priorities, attitudes, and behaviors are key to achieving that satisfaction and they are ready to deliver. We look forward to further discussing our RFP response and moving forward to the next step in the selection process.

Sincerely,



Balfour Beatty Construction, LLC
John Bernardy
Executive Vice President
Email: jbernardy@balfourbeattyus.com

Balfour Beatty acknowledges the following addenda:

Addendum No. 1 - Date: 09/06/2022
Addendum No. 2 - Date: 09/07/2022
Addendum No. 3 - Date: 09/13/2022
Addendum No. 4- Date: 10/06/2022



2.

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Heart of Los Angeles (HOLA)
Performing Arts Building

Balfour Beatty

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Palomar College
Theater Addition Renovation

3. IDENTIFICATION OF PROPOSER

3.

IDENTIFICATION OF
PROPOSER

Balfour Beatty

3. Identification of the Proposer

(1) LEGAL NAME AND ADDRESS OF FIRM

Balfour Beatty Construction, LLC
13520 Evening Creek Dr, North Suite 270
San Diego, CA 92128

(2) LEGAL FORM OF FIRM AND STATE OF REGISTRATION

Balfour Beatty Construction operates as a Limited Liability Corporation.
State of Registration: Delaware

(4) CALIFORNIA CONTRACTOR LICENSE NUMBER(S)/ CLASSIFICATION(S), EXACT NAME OF LICENSE HOLDER ON FILE, AND WHETHER THE LICENSE HAS BEEN SUSPENDED OR REVOKED WITHIN THE LAST FIVE (5) YEARS.

CA Contractor License: 979126*
Classifications:

A - General Engineering

B - General Building

License Holder: Balfour Beatty Construction, LLC

*This license has never been suspended or revoked. It is current, valid and in good standing with the California Contractors State License Board.

PRIMARY POINT OF CONTACT

Bryan Osborne, Vice President
P 949.502.4000 | M 310.633.3427
bosborne@balfourbeattyus.com



History of Firm

Balfour Beatty is an industry-leading provider of lease-leaseback, construction management, general contracting, and design-build services for our clients in Southern California and across the nation with nearly four decades of experience. Delivering iconic projects and best in class partnerships, our teams build the unique structures that play an important role in how people live, work, learn, and swim in our communities.

Our Mission

To deliver project excellence & enhance our communities.

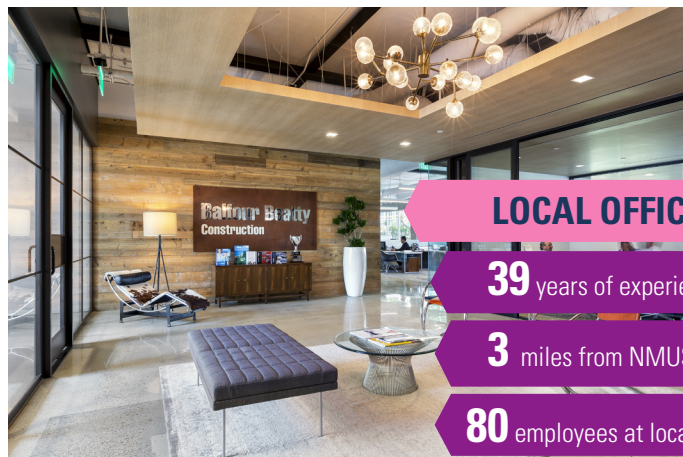
We are relentless allies who thrive on building personal, collaborative relationships and have a steadfast determination to find the best solution for or any challenge we face.

This pursuit of excellence is the fuel to be the best partner through the expertise of our top-talent.

We won't stop until we deliver project excellence and a positive impact in the communities we serve.

(3) LOCAL OFFICE PRIMARILY RESPONSIBLE FOR PROVIDING THE REQUIRED LLB SERVICES FOR NMUSD

1501 Quail Street, Suite 130
Newport Beach, CA 92660
p: 949.502.4000
e. alert@balfourbeattyus.com



LOCAL OFFICE

39 years of experience

3 miles from NMUSD

80 employees at location

3,646 firm wide



Culver City Unified School District
Robert Frost Auditorium



4. STAFFING RESOURCES

4.

STAFFING RESOURCES

Balfour Beatty

Meet Your Expert Team

Our team believes in the true value of effective collaboration and partnership.

The extent of our success is not only measured by the projects we build, but most importantly by the quality of our personnel. We consider our award-winning staff to be our greatest asset, and we continuously strive to educate and empower our teams with the most valuable trainings and tools available. In turn, this provides the leadership, responsibility and dependability of a team that Newport-Mesa Unified School District can count on! Eliminating all learning curves, we’ve proposed an expert team that possesses the knowledge, experience, and character to get your project done safely and with the highest quality.



KEY MANAGEMENT & PROFESSIONALS FOR NEWPORT-MESA USD

Each of such key personnel currently are fully qualified, experienced, and, as applicable, properly and appropriately licensed to perform the preconstruction services and other services necessary to complete the Project using the Lease-Leaseback construction delivery method consistent with current provisions of California Education Code Section 17406.



John Bernardy
Executive VP / BUL



Bryan Osborne
VP Operations



Arnold Arsenault
Project Executive



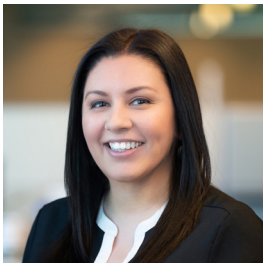
Trevor Perry
Sr. Project Manager



Zach Zavilla
Superintendent



Jonathan Recalde
Sr. Project Engineer



Annie Del Rio
Minority Business Development Specialist



Jesse Jones
Senior Project Scheduler



John Baradin
Safety, Health, and Environmental Director



Claire Mao
VDC/BIM Manager



Jesse Schmidt
Senior Preconstruction Manager

4. Staffing Resources

Your Principal Team

Meet your team! This proposed personnel team will be principally responsible for working with the District and who will be assigned to the project. The extent of our success is not only measured by the projects we build, but most importantly by the quality of our personnel. We consider our award-winning staff to be our greatest asset, and we continuously strive to educate and empower our teams with the most valuable trainings and tools available. In turn, this provides the leadership, responsibility and dependability of a team that – once again – NMUSD can count on! Eliminating all learning curves, we've proposed an expert K-12 specialized team that possesses the knowledge, experience, and character to get your project done safely and with the highest quality!



ARNOLD ARSENAULT, CCM, LEED GA
Project Executive

31

Years of
Experience

YEARS WITH BALFOUR BEATTY

35 years total experience
3 years w/ Balfour Beatty

EDUCATION / CERTIFICATIONS

- Civil Engineering, A.A., Fullerton College
- CASH School Facilities Leadership OSHA 30-Hour Training
- Licensed California Contractor
- Computer Information Systems Certs
- CPR/First Aid/AED Certified
- Zero Harm Safety Training
- Certified Construction Manager (CCM)
- LEED GA



Edgewood Aquatic Sports Complex and Event Center

Arnold has over 30 years of experience in the construction industry, 20 of those years have been spent building school facilities including K-12, Community College and Universities ranging from \$1M to \$140M. Arnold is keenly familiar with all aspects of building from design through commissioning and DSA certification. Being a builder has enabled him to effectively collaborate and work with owners, architects, and inspectors to implement efficient and effective management processes and a consistent level of service to the clients.

SELECT RELEVANT EXPERIENCE

WEST COVINA UNIFIED SCHOOL DISTRICT

- Edgewood Aquatic Sports Complex and Event Center | 2018-2020 | **LLB**

MORENO VALLEY UNIFIED SCHOOL DISTRICT

- Moreno Valley High School Performing Arts Center | 2019 |

LONG BEACH UNIFIED SCHOOL DISTRICT

- Bixby Elementary HVAC | 2019-2020 | **LLB**
- Muir K-8 HVAC | 2019-2020 | **LLB**
- Hughes Middle School HVAC | 2020-2022 | **LLB**

BALDWIN PARK UNIFIED SCHOOL DISTRICT

- Baldwin Park High School Gym | Active | **LLB**

HACIENDA LA PUENTE UNIFIED SCHOOL DISTRICT

- La Puente High School Pool and Kitchen | 2020-2022 |
- Wedgewoth Elementary School | Active |

SANTA ANA UNIFIED SCHOOL DISTRICT

- Irvine Newport Dev Area (INDA) | 2020-2022 |
- John Muir Fundamental Elementary | 2018-2019 |

ORANGE UNIFIED SCHOOL DISTRICT

- Orange High School Science Center | 2017-2020 |

TUSTIN UNIFIED SCHOOL DISTRICT

- Tustin Legacy Magnet Academy | 2016-2020 |



TREVOR PERRY

Senior Project Manager

23

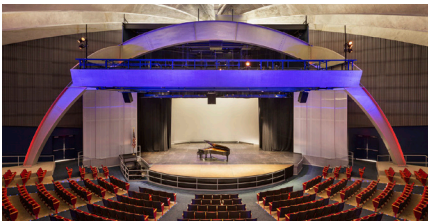
Years of
Experience

YEARS WITH BALFOUR BEATTY

23 years total experience
5 years w/ Balfour Beatty

EDUCATION / CERTIFICATIONS

- BS Business, National University
- OSHA 30-Hour Training
- Project Management Training
- Heavy equipment Operator
- Hazardous Material Handling
- DSA Project Inspector Previous
- First Aid/CPR



Robert Frost Auditorium Improvements

As the Senior Project Manager, Trevor is responsible for infusing the company's knowledge and experience base in project construction and design management. He will leverage our knowledge of alternate project delivery and lean construction processes throughout the implementation of the program while working in unison with the construction team, design team, and all program stakeholders ensuring continuity throughout the whole process from coordination to the design, preconstruction, and construction phases. Trevor will be managing the architects, consultants, and contractors through BIM coordination, design, estimating, constructability reviews, construction commissioning and closeout. Trevor builds effective relationships with clients, design teams, subcontractors, and user groups.

SELECT RELEVANT EXPERIENCE

IRVINE UNIFIED SCHOOL DISTRICT

- Woodbridge High School & South Lake Middle School Modernizations | 2021-2022|

CULVER CITY UNIFIED SCHOOL DISTRICT

- Robert Frost Auditorium Improvements | 2014-2018 |

TORRANCE UNIFIED SCHOOL DISTRICT

- Torrance High School Modernization | 2017-2020 | **LLB**
- Calle Mayor Middle School Gymnasium | 2018-2020 |

- Bert Lynn Middle School Gymnasium | 2018-2020 |
- Madrona Middle School Gymnasium | 2017-2018 |
- Magruder Middle School Gymnasium | 2017-2018|

CHINO VALLEY UNIFIED SCHOOL DISTRICT

- Ayala High School Phase 2 Buildings Preconstruction Services | 2020-2021|



ZACH ZAVILLA

Superintendent

16

Years of
Experience

YEARS WITH BALFOUR BEATTY

16 years total experience
9 years w/ Balfour Beatty

EDUCATION / CERTIFICATIONS

- OSHA 30-Hour Training
- Certified Construction Manager (CMIT)
- Certified Inspector of Sediment and Erosion Control (CISEC)



West High School Auditorium

Zach is a dependable former industry carpenter with 16 years of hands-on experience and an adept ability to communicate and relate to all trade partners. As the project Superintendent, Zach will be responsible for all field operations, including communicating and coordinating with the subcontractor team. His primary focuses will be safety, quality control, supervision of all field construction work, schedule development and execution using pull-planning and the implementation of our Zero Harm Safety Program. He will collaborate with the team in developing the project schedule, actively participate in preconstruction activities, and ensure that the project is built on time, within budget and in accordance with project goals.

SELECT RELEVANT EXPERIENCE

WEST COVINA UNIFIED SCHOOL DISTRICT

- Edgewood Sports Complex and Event Center | 2018-2020 | **LLB**

TORRANCE UNIFIED SCHOOL DISTRICT

- North High School Auditorium | 2017-2018 |
- West High School Auditorium | 2016-2018 |
- Edison Elementary School Modernization | 2016-2017 |
- Carr Elementary School Modernizations |

2014-2015 |

TUSTIN UNIFIED SCHOOL DISTRICT

- Tustin Legacy Magnet Academy | 2016-2020 |
- Beckman High School Synthetic Turf Fields | 2016 | **LLB**

MANHATTAN BEACH UNIFIED SCHOOL DISTRICT

- Pacific Elementary School Modernizations | **LLB**



San Diego Unified School District
Mira Mesa High School Music Building

5. DVBE

5.

DVBE

Balfour Beatty

DVBE Approach and Engagement

Balfour Beatty has extensive relationships with over **300+ DVBE** trade partners throughout Orange and Los Angeles County Area! We value their work and vital contributions to overall team success.

Balfour Beatty commits to, and shares, the district's commitment to include Disadvantaged and veteran Business Enterprises (DVBE's) in project opportunities. We consistently exceed, and will strive to exceed, these participation requirements!

Outreach and Participation Strategy

Balfour Beatty believes a multi-tiered approach is an essential way to ensure maximum participation of DVBE subcontractors, vendors, and suppliers in all phases of the project. Our approach includes the following activities:

- » Assist with Balfour Beatty's prequalification application
- » Assist companies in getting prequalified with Newport-Mesa USD
- » Conduct targeted outreach directly to DVBE firms in our database and conduct extensive research of DVBE businesses.
- » Place Bid Notice Ads in local construction publications.
- » Size bid packages for DVBE inclusion.
- » Conduct targeted outreach directly to DVBE firms in outside databases such as the California Department of General Services; California Public Utilities Commission (CPUC) Supplier Clearinghouse, and California Unified Certification Program (CUCP/ Caltrans).
- » Review various DVBE certification databases/directories with emphasis on local business participation such as the Office of Small Business & Disabled Veteran Business Enterprise Services.
- » Distribute multiple bid, Pre-bid, outreach event, and technical work session notifications to Distribute multiple project notifications directly to DVBEs organizations.
- » Host and participate in Trade Partner Outreach Events to share upcoming projects and encourage DVBE participation.
- » Mentorship for the continued growth and success of DVBE partners including training and resources.

Meet Annie Del Rio

Our Minority Business Development Specialist!



Annie is known for helping our district clients exceed their targeted DVBE

Participation goals. She will work with our team and NMUSD in an effort to engage Disabled Veteran Business Enterprises (DVBE's) on the Estancia High School Theater project.

In her current role, Annie works closely with our district partners on various active projects during the bid phase, as well as planning outreach events and trainings for DVBE trade partners, suppliers, equipment providers, and manufacturers. She helps these businesses get prequalified and ready to work with Balfour Beatty and our district clients. From the start of construction through closeout, Annie will work closely with the project team and NMUSD staff to engage, track and report local business and DVBE participation, ensuring alignment of goals and meeting/exceeding all requirements.



Annie recently exceeded our district partner's goals on a \$38.8M new K-8 school campus, achieving 13% DVBE participation!



"This is a prime contractor who puts its money where its mouth is and takes its small business program seriously!"

-Karen Linehan,

Outreach Program Manager

San Diego Unified School District



San Diego Unified School District
Hoover High School Theater

6.

FISCAL STABILITY

Balfour Beatty

6. Fiscal Stability

By the Numbers

STRENGTH AND STABILITY AS A BUSINESS

Balfour Beatty Construction, LLC has a long history of financial strength and is a subsidiary of Balfour Beatty plc. Balfour Beatty has no long term debt and operates autonomously and fully by utilizing the equity held within the company. Further, Balfour Beatty has sufficient cash reserves and other liquid assets as to not necessitate additional liquidity via a line of credit or similar borrowing capacity.

Please see Fiscal Stability Supporting Documents for

- (a) A current report from Balfour Beatty's credit rating service
- (b) Balfour Beatty's letter of credit
- (c) Balfour Beatty's latest financial statement
- (d) A notarized statement of surety stating Balfour Beatty's current/sufficient bonding capacity.

(e) Current Value of all Work Under Contract

\$1.6B

Work Under Contract

\$631M

Remaining to Complete

Business Construction Revenues for the Past Five Years

2021

\$3,762,423,000

2020

\$4,058,162,000

2019

\$4,066,307,000

2018

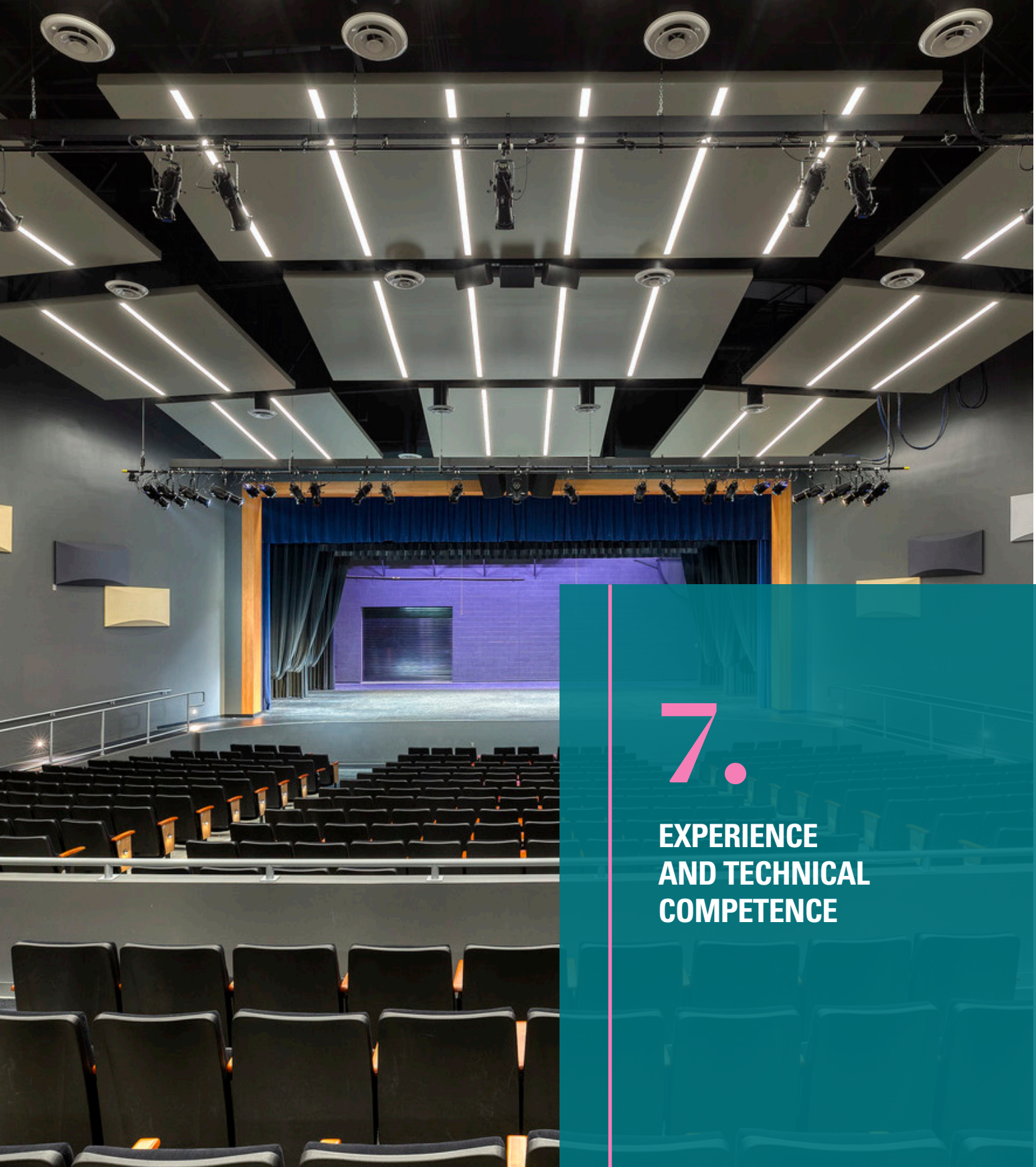
\$3,753,411,000

2017

\$3,953,603,000



Culver City USD | Robert Frost Performing Arts Center



Torrance Unified School District
West High School Auditorium

7. EXPERIENCE AND TECHNICAL COMPETENCE

7.

**EXPERIENCE
AND TECHNICAL
COMPETENCE**

Balfour Beatty

7. Experience and Technical Competence

a. Experience

DESCRIPTION OF PROPOSER'S EXPERIENCE, TECHNICAL AND PROFESSIONAL SKILLS

Having completed and closed outover 735 education projects, our team is dialed-in when it comes to DSA representatives, policies, and procedures. Throughout all phases of our projects, our team works closely with the design team, DSA inspector, and District consultants – ensuring that the project complies with the codes and regulations governing educational facility construction in order to ultimately achieve proper DSA project closeout. Our closeout process consists of examination of specific project files for documents required to be submitted before, during, and after construction to determine if outstanding issues have been resolved.

EXPERIENCE WITH DSA ON K-12 PROJECTS

With over 700 local education projects completed and closed-out, our team is dialed-in when it comes to state agencies, the California Department of General Services, and DSA representatives, policies, and procedures. Our team is intimately familiar with Fire life safety, Structural/Seismic, and ADA path of travel requirements for school related projects and will work with your design team prior and during construction to ensure all necessary state requirements are adhered to.

Our team is well versed with the requirements of the DSA 152 Inspection Card. It is a document we rely on alongside the Inspector of Record to ensure that every installation is in compliance with the required testing and sign-offs as necessary for the Division of State Architects.

Throughout all phases of your projects, our team will work closely with the design team, DSA inspector, and District consultants – ensuring that your projects comply with the codes and regulations governing educational facility construction, in order to ultimately achieve proper DSA certification. We will fully review every required item, non-compliance, and open deviations to strategize proper closure and reasonable solutions. We have done so successfully on our previous California Academic projects. Our team is proactive from the beginning of all projects and have the proven experience working on previous K-12 projects. We ensure that all necessary DSA forms have been filed, DSA IOR has been assigned and that the project has been set up for success from the beginning. We monitor and work with the project team to mitigate any deviations, or changes that might affect the final DSA approvals. Ultimately, our team's goal is to have all related issues resolved and closed-out prior to the completion of the project.

FULFILLMENT OF THIS RFP

With over **30+ theaters completed**, we have assembled an experienced and proven team to successfully deliver the Estancia High School Theater. **Our team is diverse, experienced, and will be transparent while keeping you informed in advance of any issues that arise and will always bring solutions to problems.** Throughout the following pages you will find the expertise you are seeking for the success of your project.

We lead the industry in efficient technologies that will support your project and have customized proprietary processes to ensure client satisfaction that we will bring to your project. We will continuously verify that our team stays aligned with the project and stakeholder goals and will course correct at all times to ensure we exceed your expectations. Our purpose is to be your Relentless Ally for the success of your project.

Our team is comprised of experts in their fields who are ready to bring their talent to this project. Within our company, we have the tools to provide you with experienced estimators, schedulers, and project team members. By providing these services in house, we are able to deliver customized services to our clients without adding extensive costs to the project budget.

Balfour Beatty is a strong believer in giving back to local community and support your various foundations and programs that serve students. We are actively involved in mentoring programs, such as Ace Mentoring, which provides students with work-based learning experiences that prepares students for future careers in Advanced Manufacturing, Architecture, Construction, and Engineering. During construction, and in coordination with the District we can host job site visits at major milestones of the project to be used as continuing education for students on campus. As your partner, we are not only your builder, but we will extend our expertise to the staff, students and community within Newport-Mesa High School District.



7. Experience and Technical Competence



SAN DIEGO UNIFIED SCHOOL DISTRICT
Hoover High School Theater

*Please see full page description
in Appendix for more.*



WILLIAM S. HART UNION HIGH
SCHOOL DISTRICT
**Canyon High School
Performing Arts Center**

*Please see full page description
in Appendix for more.*



WEST COVINA UNIFIED SCHOOL DISTRICT
**Edgewood High School
Events Center**

*Please see full page description
in Appendix for more.*



TORRANCE UNIFIED SCHOOL DISTRICT
Torrance High School Theater

- (i) This 85,000 sf lease-leaseback project included the demolition of the original 1930s theater and construction of a new theater and three-story classroom building on an active, 2,200-student campus.
- (ii) Lease-Leaseback Entity
- (iii) 04/2018-08/2020
- (iv) \$49,200,345
- (v) \$49,200,345
- (vi) See Appendix
- (vii) Balfour Beatty has proudly served SDUSD for the last 38 years! [Click Here](#) to see a video

- (i) New Performing Arts Center (PAC) brings innovation and beauty to the school's campus with its many features including a ticket office, seating for an audience of 450, an orchestra pit, a control room, a main stage, a scene shop and a drama classroom.
- (ii) Lease-Leaseback Entity
- (iii) 09/2014-04/2016
- (iv) \$17,247,374
- (v) \$17,247,374
- (vi) See Appendix

- (i) New Edgewood High School Event Center included a ticket building, concession stand, coaches offices, locker rooms, restrooms, storage, weight training room, classrooms, career and technical education (CTE) classrooms, multi-purpose room, gymnasium
- (ii) Lease-Leaseback Entity
- (iii) 10/2018-06/2020
- (iv) \$27,847,177
- (v) \$27,847,177

- (i) This whole sire modernization included the full theater relocation and upgrade.
- (ii) Lease-Leaseback Entity
- (iii) 12-2014-11/2017
- (iv) \$44,310,740
- (v) \$44,310,740
- (vi) See Appendix
- (vii) Balfour Beatty has proudly served TUSD on over 30 school sites! See Appendix for Reference Letter

*Please see full page description
in Appendix for more.*

of Jason Babineau, Hoover HS principal speak about this project.

(viii) Rick Mortazavi, Lead Construction Manager
2351 Cardinal Lane, Building M, San Diego
CA 92123

e. rmortazavi@sandi.net

p. (858) 225-9923

(ix) Discussion of claims, demands, and/or litigation arising from the project and involving the Proposer, and resolution of same. **N/A**

(vii) Balfour Beatty has worked on various projects within this district and maintains a strong relationship. See Appendix for Reference Letter

(viii) Mike Otavka, Director of Facilities
21380 Centre Pointe Parkway, Santa Clarita,
CA 91350

e. motavka@hartsdistrict.org

p. (661) 753-5740 x274

(ix) Discussion of claims, demands, and/or litigation arising from the project and involving the Proposer, and resolution of same. **N/A**

(vi) See Appendix

(vii) See Appendix for Reference Letter

(viii) David Larkin, Director of Facilities and Capital Projects

717 W Merced Ave, West Covina, CA 91790

e. dlarkin@wcusd.org p. 626.939.4600

(ix) Discussion of claims, demands, and/or litigation arising from the project and involving the Proposer, and resolution of same. **N/A**

(viii) Dr. George Mannon, Superintendent (retired)

335 Plaza Del Amo, Torrance, California
90509

e: gwmannon@gmail.com

p: (310) 480.4606

(ix) Discussion of claims, demands, and/or litigation arising from the project and involving the Proposer, and resolution of same. **N/A**

7. Experience and Technical Competence



SAN DIEGO UNIFIED SCHOOL DISTRICT
**Mira Mesa High School
Music Buildings**

*Please see full page description
in Appendix for more.*

(i) A single-story band and orchestra building was also constructed and included a 14,800 sf building with 2 separate classrooms for band and orchestra with instrument and uniform storage, lockers, an ensemble practice room, individual practice rooms, a music library, and faculty offices

(ii) Lease-Leaseback Entity

(iii) 09//07/2018- 09/01/2020

(iv) \$43,266,739

(v) \$43,266,739

(vi) See Appendix

(vii) Balfour Beatty has proudly served SDUSD for the last 38 years! See Appendix for Reference Letter.

(viii) Dave Machek, Construction Manager
4100 Normal Street, San Diego, CA 92103
p. 619.517.7131 | e. dmachek@sandi.ne

(ix) Discussion of claims, demands, and/or litigation arising from the project and involving the Proposer, and resolution of same. **N/A**

c. Ability to Respond to District Needs

ABILITY TO PROVIDE CONSTRUCTION PHASE LEASE-LEASEBACK SERVICES EXCLUSIVELY AND IN A TIMELY MANNER FOR THE DISTRICT

We see no issues with responding to the District's needs within the District's reasonable time-frame.

Lease-Leaseback Services

Balfour Beatty boasts an impressive resume of K-12 public school projects that were completed utilizing the lease-leaseback delivery method.

As a matter of fact, we were among the first construction firms to implement and master this highly successful delivery method.

Feel confident knowing Balfour Beatty is among the most experienced lease-leaseback builders in California having built over 235 lease-leaseback projects totaling over \$2.5 billion.

Our team prefers using the lease-leaseback delivery method over traditional delivery methods, the flexibility afforded by the lease-leaseback delivery method allows us to thoroughly review design documents with Newport-Mesa USD as well as the design teams resulting in reduced change orders and skillfully completed projects that are on budget.

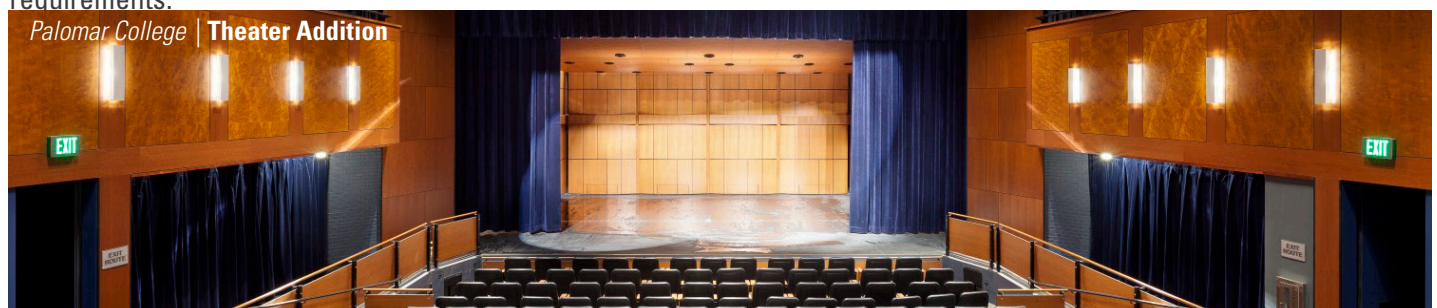
With a lease-leaseback contract arrangement, we are one of the most experienced firms and understand Education Code 17406, as well as new legislation signed into law, AB 2316 and recent changes with the AB 3018 reporting requirements.

What that means to you is we will be able to hit the ground running and ensure we stay in compliance, so that there will be no issues or challenges to the lease-leaseback agreements and your project will remain on time and on track.

Balfour Beatty will provide both preconstruction and lease-leaseback services exclusively and in a timely manner for the district. Having successfully completed over 235 lease-leaseback projects, inclusive of preconstruction services, we are proud to have provided all our services in-house and exclusively for each district.

We don't outsource preconstruction services or lease-leaseback services since it is critical to maintain project information and project issues in-house in order to ensure there is continuity between the preconstruction phase and the construction phase.

In terms of timing, we have prior extensive experience with the lease-leaseback contracts we feel these can quickly be executed and can proceed as quickly as you can issue the Notice to Proceed. We have a history of completing projects on time as mentioned in prior section covering our record of meeting deadlines.



7. Experience and Technical Competence

d. Contracting History

Our stakeholders must trust that we will work in the most principled manner. Just as we “expect more” of ourselves, others must know that we will uphold the highest ethical standards in the way we conduct business, make decisions, and treat one another.

Describe in detail if the proposer has been involved in any of the following within the last five (5) years:

Failure to enter into a contract or professional services agreement once selected

No

Withdrawal of a proposal or bid as a result of an error

No

Termination or failure to complete a contract

No

Debarment by any municipal, county, state, federal or local agency

No

Involvement in litigation, arbitration, or mediation in the last ten (10) years

No

Conviction of the firm or its principals for violating a state or federal antitrust law by bid or proposal rigging, collusion, or restrictive competition between bidders or proposers, or conviction of violating any other federal or state law related to bidding or performance of services

No

Knowing concealment of any deficiency in the performance of a prior contract

No

Falsification of information or submission of deceptive

No

Willful disregard for applicable rules, laws, or regulations

No

f. Additional Information

Please refer to Appendix for additional information.

g. Technical Competence

OUR TECHNOLOGY TOOL KIT

Design Phase

- Autodesk Revit
- Autodesk Navisworks
- Destini Estimator
- Sketchup/Google Earth
- BIM Storm
- Target Value Design
- Rapid Cost Modeling
- Cloud sharing
- Program/Design Validation
- Energy Modeling
- Unifier
- Open Space

Construction

- BIM & Clash Detection
- Digital Docs
- 3D, 4D (cost) Modeling
- 5D(schedule) Modeling
- Clash Detection
- Site Logistic Modeling
- Laser Scanning
- iPads (for field use)
- BIM 360 Field (Vela)
- GIS
- Unifier
- OpenSpace
- Procure

Handover

- Digital Docs
- Autodesk Revit/Navis Works
- Unifier

7. Experience and Technical Competence

g. Technical Competence

Support Services Staff

**ABILITY TO DRAW UPON
MULTI-DISCIPLINARY STAFF
TO ADDRESS THE SERVICES
REQUIRED UNDER THIS RFP**

Having in-house resources dedicated to your project is just another way we can ensure budget and schedule adherence as well as a successful and collaborative project delivery!

These selected individuals will be readily available to assist our project team and Newport-Mesa USD at any time along the way!

Note: Our resources include virtual design and construction/ BIM, estimating, scheduling, safety, environmental, sustainability, community outreach, diversity, legal, accounting and marketing/public relations.



JESSE JONES, PSP | Senior Project Scheduler

As a Senior Scheduler with Balfour Beatty, he has 17 years of experience in the construction industry and enhances project planning and project delivery teams through his close consideration of project-specific risks. By working hand-in-hand with the Project Manager and Superintendent to generate master schedules, he develops a plan incorporating logic appropriate for both the scope and the client. Jesse is proficient in Primavera P6, MS Project Management, and Last Planner.



CLAIRE MAO, CMIT, EIT, LEED GA, DBIA | VDC/BIM Manager

As a member of our international award-winning BIM Department, she is well versed in BIM, Virtual Design and Construction (VDC) and plan and spec reading. What sets Claire apart is her ability to develop the BIM model and communicate the right information to the team. She takes her experience even further with the creation of coordination plans, teaming agreements, and co-location strategies for BIM implementation from design, preconstruction through closeout.



JOHN BARADIN | Safety, Health and Environment Director

John has over 26 years experience and approaches each project with dedication and desire to successfully complete projects, on time, and hazard free. As Safety Director, John oversees all safety activities and assures the safety of all workers on the job site. He will observe and review site conditions to prevent incidents and injuries to the workers and the public, and conduct job specific safety meetings with all workers on site.



ANNIE DEL RIO | Minority Business Development Specialist

Annie is committed. In her current role, Annie will work closely with the project team during the bidding phase helping coordinate local outreach events and training for DVBE subcontractors, suppliers, equipment providers and manufacturers. She will help educate contractors on how to get pre-qualified and ready to work with Balfour Beatty and the Newport-Mesa USD. If desired by the District, Annie is available to work closely with the project team and staff to engage, track and report DVBE participation, ensuring alignment of goals and the meeting/exceeding of requirements!



JESSE SCHMIDT | Senior Preconstruction Manager

As the Senior Preconstruction Manager, Jesse's responsibilities will include design and budget management, constructability reviews, value engineering, estimates, change order validation, scheduling, logistics planning, trade contractor coordination, and owner/inspector communications. He will thoroughly evaluate the design plans and construction site to ensure a seamless transition into the construction phase and avoid any complications or unforeseen issues.



Hemet Unified School District
Hemet High School Theater

8. INSURANCE

8.

INSURANCE

Balfour Beatty



October 22, 2022

Jonathan Geiszler, Director, Purchasing & Warehouse
Newport-Mesa Unified School District
2985 Bear Street
Costa Mesa, California 92626

**RE: Newport-Mesa Unified School District
Estancia High School Theater Request for Prequalification/Qualification**

To Whom It May Concern:

Balfour Beatty Construction, LLC is a valued customer of Willis Towers Watson. They have asked us to provide the following evidence of their capability to provide insurance. We understand this representation is being required under terms of the RFP/Q, and that this response will be taken into consideration with the selection of bidders.

Balfour Beatty Construction, LLC's Corporate Insurance Program with carriers as listed below for the period of 10/1/2022 – 10/1/2023, includes a 30-day Notice of Cancellation, and the following liability limits:

- Commercial General Liability – Zurich American Insurance Company (AM Best Rating A+ XV)
 - \$3,000,000 Each Occurrence / \$6,000,000 General Aggregate / \$6,000,000 Products-Completed Ops.
 - General Aggregate limit applies per project
 - Blanket Additional Insured endorsements CG2010 are included for the entities required in the written contract, primary and non-contributory.
- Automobile – Zurich American Insurance Company (AM Best Rating A+ XV)
 - \$5,000,000 Combined Single Limit
 - Blanket Additional Insured endorsement included for the entities required in the written contract, primary and non-contributory.
- Workers' Compensation – Zurich American Insurance Company (AM Best Rating A+ XV)
 - Statutory
 - \$1,000,000 Employer's Liability
 - Blanket Waiver of Subrogation endorsement is included for entities required in the written contract.
- Builders Risk – Insurance Carriers to be determined
 - Greater of the Full Estimated Replacement Cost of the Work or the Contract Price for the Project
 - Owner and Subcontractors included as insureds with waiver of subrogation for insured parties.

As a licensed representative for the above insurance companies, we are pleased to confirm our willingness and ability to promptly provide and maintain insurance as required in the CSA should **Balfour Beatty Construction, LLC** be awarded the contract.

If you have any questions, please feel free to give us call.

Sincerely,

A handwritten signature in blue ink that reads 'Kevin Glasgow'.

Kevin Glasgow
Senior Vice President

Direct: 615-872-3106
Email: kevin.glasgow@willistowerswatson.com

Willis Towers Watson Southeast, Inc., 26 Century Blvd., P. O. Box 305025 (37230-5025) Nashville, TN. 37214



Wiseburn Unified School District
Da Vinci High School Theater

9.

LITIGATION INFORMATION

Balfour Beatty

9. Litigation Information

Culver City USD | Robert Frost Performing Arts Center



With more than 39 years providing general contracting and construction management services to California school districts, Balfour Beatty has a long history of successful dispute resolution that resolves disputes in a timely fashion while insulating our clients from undue disruption or financial detriment.

Balfour Beatty recognizes that the best dispute resolution process is **avoiding disputes before they develop**. This is best achieved through pre-project planning to properly schedule and sequence the work and to identify conflicts and ambiguities within project plans, specifications and bid packages. In the event that a dispute still arises, the Balfour Beatty project team takes immediate action to fully investigate the associated facts and circumstances and, if necessary enlisting the assistance of Balfour Beatty's in-

house legal team who has a long history of supporting our clients at no cost.

In most circumstances, disputes can be resolved amicably through direct discussion. Should a matter remain unresolved, Balfour Beatty typically avoids litigation, recognizing that the cost and disruption usually outweighs any potential benefit.

Over the past 5 years, despite more than \$4 billion in project revenue, the California Division of Balfour Beatty Construction has not been involved in any litigation, arbitration or mediation against a project owner, nor has it been terminated for cause under any construction contract. This is testament to our unwavering commitment to be your "Relentless Ally" and to the projects we are entrusted to build.

“

I am writing to express my enthusiastic recommendation of the Balfour Beatty firm for projects...we accomplished project outcomes that exceeded our financial, project and utilization goals... I can highly recommend Balfour Beatty's work and continue professional relationships in my role as Superintendent of Rio School District.

- John Puglisi, PhD, Superintendent
Rio School District

”



Heart of Los Angeles (HOLA)
Performing Arts Building

10. PROPOSED METHOD TO
ACCOMPLISH WORK

10.

PROPOSED METHOD TO
ACCOMPLISH WORK

Balfour Beatty

10. Proposed Method to Accomplish Work

The technical and managerial approach to the LLB partnership with the District, including, but not limited to the LLB Entity's standard practices and customer services policies for LLB projects.

Approach to Lease-Leaseback

Balfour Beatty has significant experience with Lease-Leaseback delivery and has successfully provided services under this delivery method for 235 K-12 projects!

Our approach to Lease-Leaseback seeks to maximize the benefits that are afforded by the LLB delivery method:



SmartStart® is our trademarked program we utilize as a framework to develop:

- **The foundations for a high-performance team**
- **A custom project strategy uniquely suited to the specific needs of the Estancia High School Theater Project and values of NMUSD .**

SmartStart® proactively addresses these issues by using the beginning of a project (after the contract award) to kick-start the project team and focus attention around four strategic areas:

ALIGNMENT – an agreed-upon expectation of team behaviors, value (defining what value means from NMUSD 's perspective), team governance and decision making.

COLLABORATIVE PLANNING – Planning the approach to preconstruction and construction processes (scheduling, procurement, workflows, and risk management) in an integrated way – involving all necessary parties.

PROACTIVE DESIGN – Enhancing the design from a constructability, value engineering and systems review standpoint – a process based on the target value design methodology that is integral to an effective and efficient design process.

SUPPORT SYSTEM – Defining and managing information and interaction workflows such as BIM execution planning, file sharing, use of technology, approach to procurement and team health.

SmartStart® Program Details

We will facilitate an interactive half-day or full-day work session with key members of the project team including the team at NMUSD and other key Design/Engineering Consultants.

The desired outcome of SmartStart® is to create a dynamic and engaging conversation around individual team member behaviors, project values, governance and execution strategies that will lay the foundation of a strong team culture that will propel us through the project.

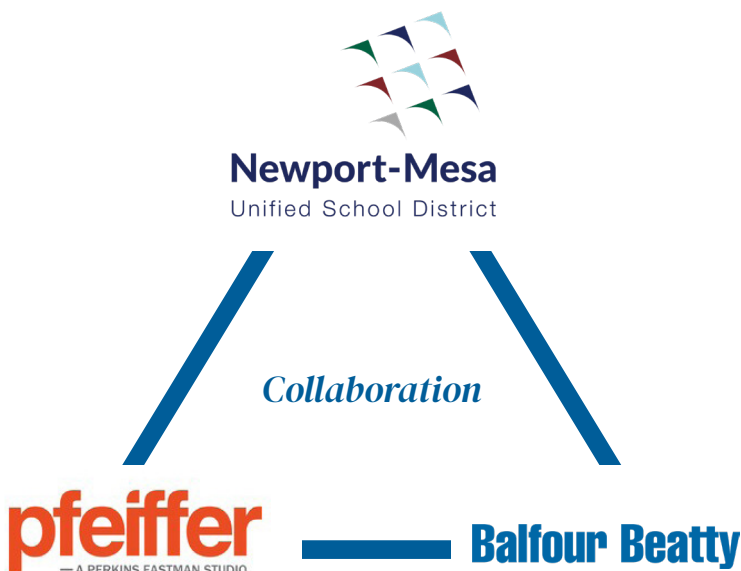
[Click here to learn more about SmartStart®](#)

How Respondent plans to incorporate construction means and methods into the Project

A thoughtful site utilization plan will enable work production to be efficient. Once selected we will collaborate with all project stakeholders to finalize the site logistics. **We will engineer safety into all aspects of this project, including the Site Logistics.** Every effort will be made to maintain Student/Staff Safety, Site Controls, Pedestrian Flow, Vehicle Access, and Traffic Flow. **Please see our detailed Site Logistics Plan and Schedule on the next page.**

Proposed project layout, access plan + Schedule!

Our proposed Site Logistics Plan and suggested Site Specific Schedule have been provided on the following pages. We look forward to collaborating with all project stakeholders during preconstruction to fully develop these plans.



10. Proposed Method to Accomplish Work

Our Approach for the Estancia High School Theater

Balfour Beatty's proposed method to build the Estancia High School Theater Project is to make your project flow seamlessly without interruption to the students and faculty with respect to building access and day to day activities.

Prior to mobilizing, Balfour Beatty has developed a detailed Site Logistics Plan (SLP) with an emphasis on construction limits, site access, laydown yard and emergency egress for personnel occupying existing buildings. We will provide temporary fencing around the entire perimeter of the project with locked entrances along Placentia Ave to keep students and community safe from construction activities. Laydown areas have been provided for procured materials and storage. Field Offices have been located

adjacent to Placentia Ave with line of sight to the building for ongoing safety. Wayfinding and construction safety signage will be provided at entrances, field offices and around the site including contact information for the Superintendent, posted in public view for any construction related concerns. We will work with the District to ensure Buildings F and G have adequate egress adjacent to the temporary construction fencing throughout construction.

Commodities and materials across the world have seen significant shortages and unprecedented delays. Balfour Beatty will get our trade partners involved as early as possible to determine long lead items and procure those materials. We look at ways of storing materials on site, at our bonded warehouse or at the

trade partners bonded warehouse to ensure materials are ready for installation. Additionally, we'll update our monthly schedules and incorporate pull planning efforts to accommodate longer than normal lead times.

We recognize the constraint that a large scale project has on an active campus. Balfour Beatty Project Managers and Superintendents will work closely with District staff to plan for all activities. Whether the campus is undergoing finals or hosting the Homecoming football game, we are malleable enough to adjust construction activities to minimize impact to faculty, students and neighbors.

See Next Page ►

QA / QC PROGRAM

Parallel to safety, quality is our top priority. Our people are highly qualified and trained, and our QA/QC program aims to assure that the quality of the new construction is consistent with the quality Newport-Mesa USD is known for!

All phases of the project are preceded by the **"Three Phases of Quality Control"** which we adapted from the military model and which we implement on our projects. The three phases are as follows:

1. Preparatory Phase: Reviewing all contract document requirements (Plans, Specs, Contracts, Building Codes, etc.) with involved trades, assessing existing conditions, and findings as a team, identifying mockups, and planning labor, material, equipment and safety needs accordingly.

2. Initial Phase: Confirming that all planned labor, material, and equipment is ready and on site, a pre-task plan, which is developed in preparatory phase, is reviewed with the actual supervisor and workers performing the work. Safety and weather conditions are reviewed for acceptability and all previous work completed by others is reviewed for acceptance and sign-off documented.

3. Follow-up Phase: Checking that the work is progressing as planned, as designed, and is being installed to the level of quality established during the preparatory phase; this includes back checking work against approved mockups

PROJECT-SPECIFIC APPROACH

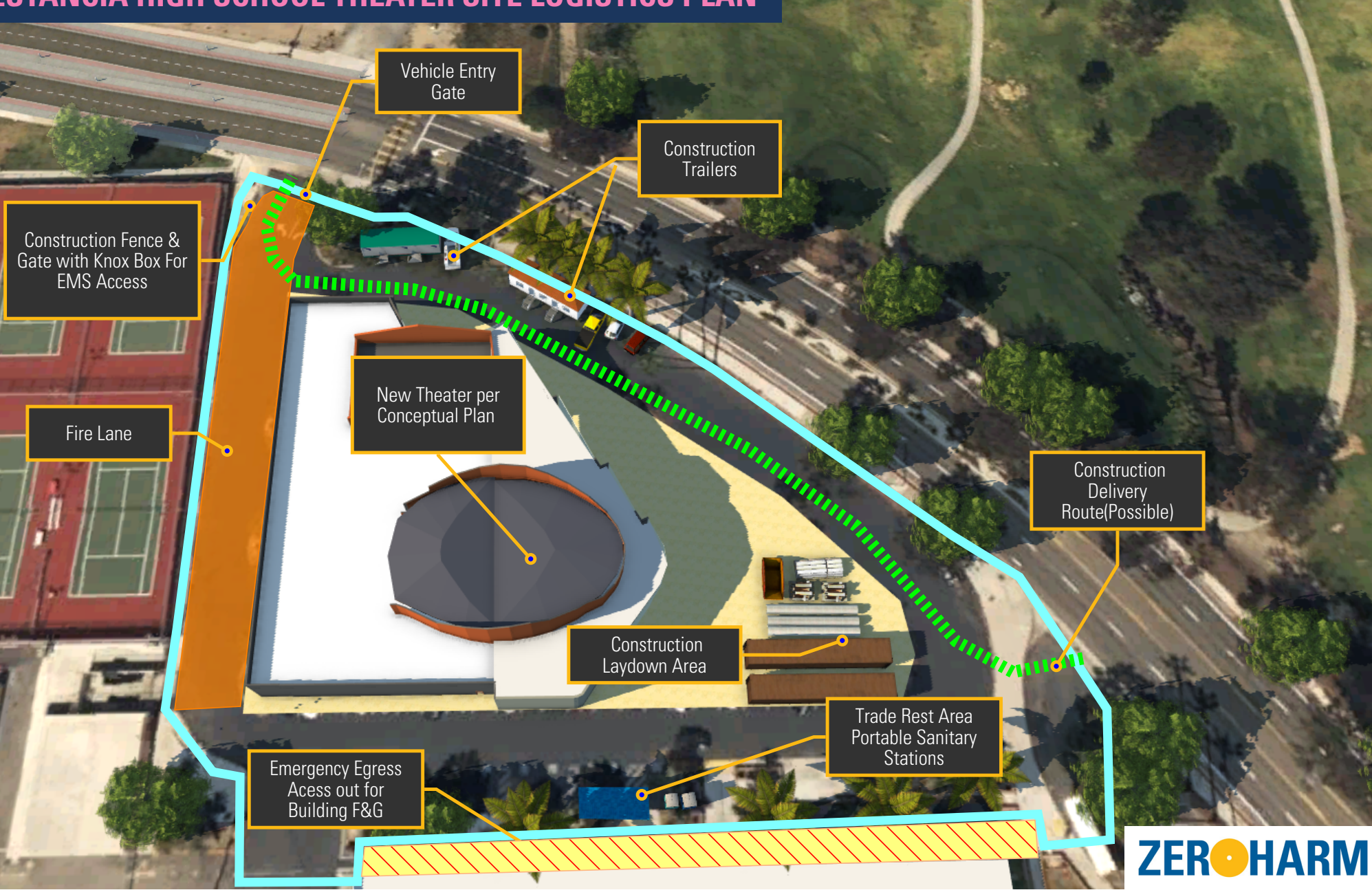
Balfour Beatty will develop and maintain a specific quality assurance and quality control (QA/QC) program for the Estancia High School Theater Project. This QA/QC plan will be developed to provide definitions, structure, and guidelines for all personnel to conform to Newport-Mesa USD's standards, contract plans, technical specifications, and other requirements.

QA/QC meetings will be scheduled on a regular basis to discuss and resolve items identified by a project management group designated quality control team. The quality control team will implement and oversee the QA/QC plan. The plan will include an expanded list of:

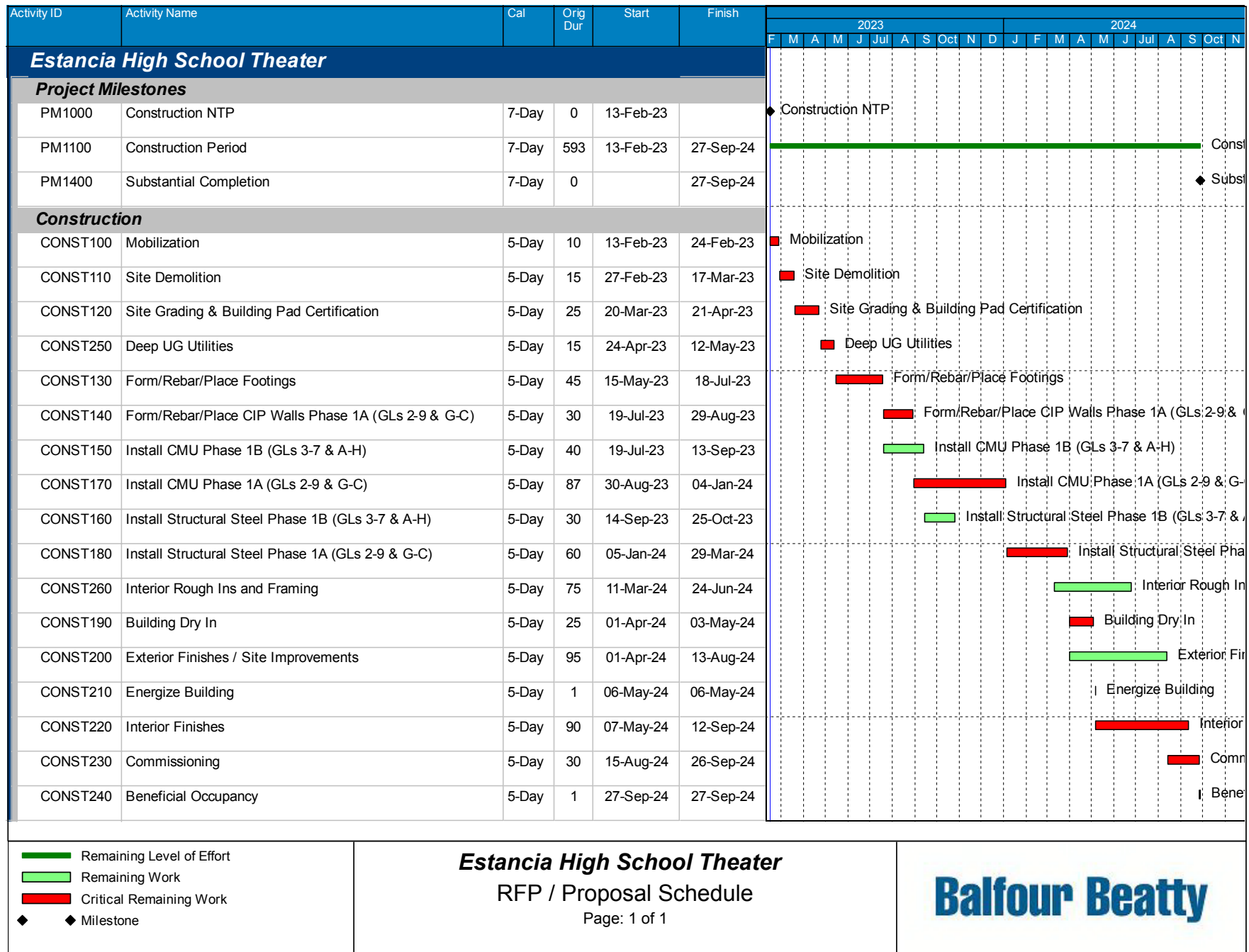
- Subcontractor quality control staff assigned to the project
- Duties and responsibilities of each member of the team
- Review of submittals prior to submission to the design team
- Complete testing log
- Procedures for tracking and completing re-work items
- List in chronological order of specification section of Definable Features of Work to be used as a basis for preparatory meetings defined in the three phase control of construction
- Pre-planning and attendance of the quality control team preparation meetings. The contractor will provide adequate time for the QA team to invite members of the design team or QA inspection staff to attend all preparatory meetings.

10. Proposed Method to Accomplish Work

ESTANCIA HIGH SCHOOL THEATER SITE LOGISTICS PLAN



10. Proposed Method to Accomplish Work



10. Proposed Method to Accomplish Work

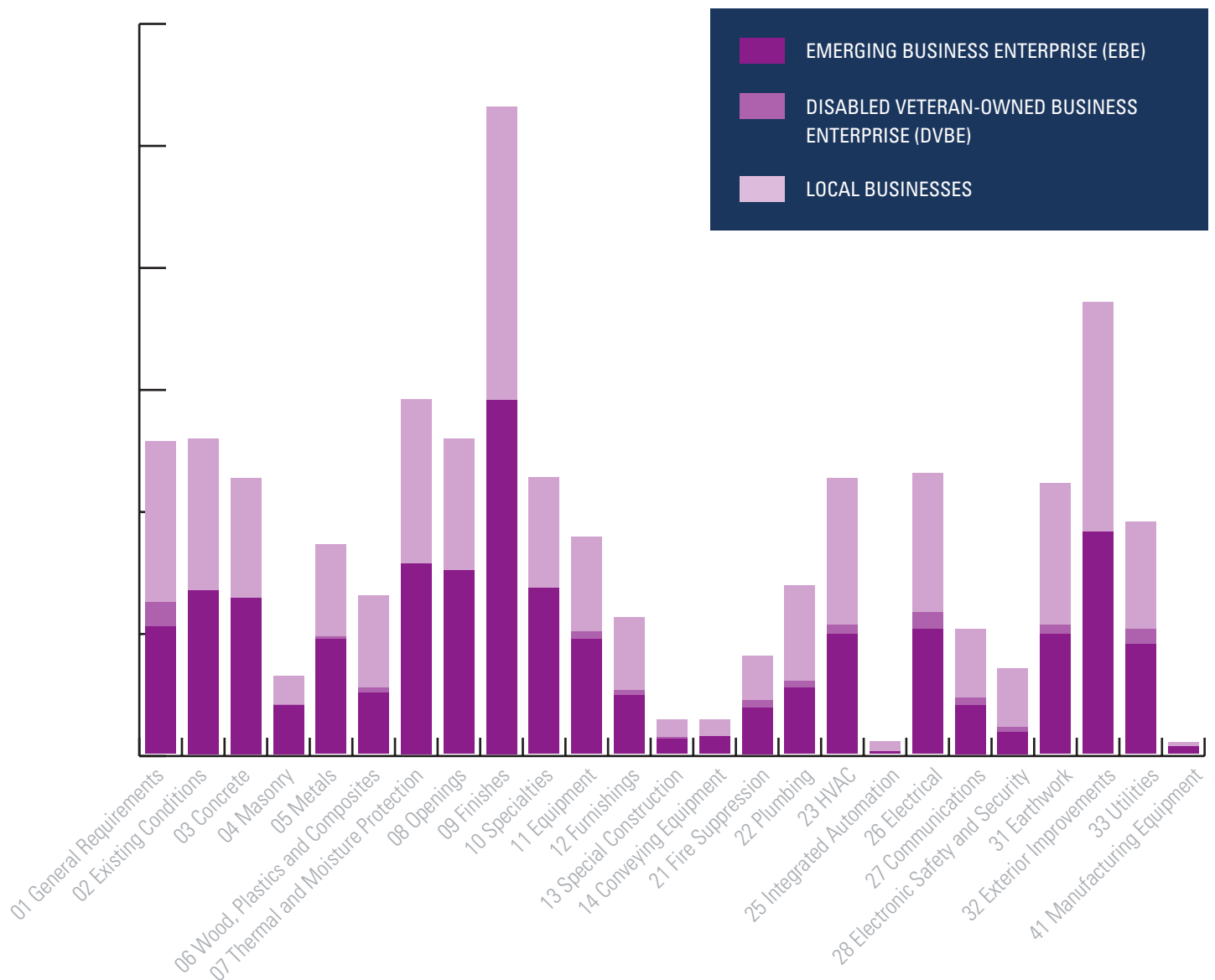
METHOD FOR COMPLIANCE WITH ALL SUBCONTRACTOR PREQUALIFICATION



Balfour Beatty utilizes BuildingConnected as our inhouse subcontractor and supplier database to manage relationships, send invitations to bid and other communications, and target companies to fill gaps. BuildingConnected is an online bid management solution. This robust, historic database manages, tracks, and sorts our database of over 4,000 companies by trades, services, geographic region, certification designations. The pool is continually updated to establish a trusted basis of subcontractors for our projects.

BENEFITS:

- Alerts targeted subcontractors of upcoming project opportunities, increasing bidder interest.
- Manages subcontractors and gives further details on companies.
- Assists in finding unique and specialty contractors for specific project needs.
- Allows for reporting functionality for proposals and bid needs.
- Synced to our prequalification database.



10. Proposed Method to Accomplish Work

100% Committed to our Local Trade Partners

Balfour Beatty is committed to leveraging the talent and experience of our local Newport Beach, Costa Mesa, and adjacent skilled and trained workforce whom we have experience working with on similar district and/or public work projects. We look forward to leveraging our vast base of subcontractors with present offices in the Newport Beach and adjacent areas to further build upon our K-12 success together. Furthermore, we are equally dedicated to building new relationships with the Newport Beach and Costa Mesa subcontractor community and encourage new partnerships.

Skilled and Trained Workforce Compliance

Balfour Beatty has a long history of monitoring and ensuring labor compliance on our projects.

As a best practice, the team utilizes **LCPtracker** to ensure the highest levels of monitoring and compliance of payment of prevailing wages. To that end, ***all trade contractors from all tiers are required to use LCPtracker for the duration of the Project.***

As part of our trade contractor on-boarding process, at every tier, trade contractors are trained on the use of LCPtracker. LCPtracker is an ASP web-hosted software program from LCPtracker, Inc. that minimizes paperwork and labor hours when enforcing a Labor Compliance Program on public works construction projects.

LCPtracker creates an online database of all certified payroll reports (CPR), uploads certified payroll reports to the DIR, allows the team to review certified payrolls before trade contractors submit to the DIR, generates audits, logs, and numerous reports.

BENEFIT: Using this comprehensive solution, LCPtracker, Balfour Beatty can produce accurate certified payroll reports easily – already checked and verified for accuracy, prior to trade contractors uploading their certified payrolls to the DIR. This additional level of review prior to submission allows the team to ensure accuracy of all certified payrolls.



Supplier Diversity & Inclusion Program



Our Supplier Diversity & Inclusion Program is a key component to our project successes. The program offers trainings, outreach, leveraging best practices, preparing tool-kits for subcontractors. To date, we have held outreach events at all of our offices, as well as several training seminars.

Our organization provides leadership and direction to internal teams and connects with external partners, clients, and community members to achieve something greater together. This includes embedding best practices for supplier diversity into our business and operational activities. Balfour Beatty also fosters an environment that encourages a diverse employee base.

Balfour Beatty is frequently asked to speak nationally and locally on the topics of supplier diversity, small business inclusion, and capacity building. As active community members, we serve on boards and on several committees for organizations such as National Association of Minority Contractors (NAMC), Women Construction Owners & Executives (WCOE), and the Women Construction Coalition (WCC).

10. Proposed Method to Accomplish Work

Local Outreach and Hire Program

Balfour Beatty plans to include local business and local hires is designed to ensure proactive measures are taken to inform local businesses and workers of the subcontracting, supplier, vendor, equipment, technical services, and other service opportunities. We have a history of not only meeting - but exceeding - project goals and educating our local, diverse, and small business partners.

Local and Disadvantaged Business Outreach

Getting and keeping the Local Community informed and excited about the opportunities coming to the Newport-Mesa USD is a critical step in our process or local hiring and outreach. early and advance notice is given to local and disadvantaged businesses to provide ample time for learning about the project and the requirements pertaining to their respective scope of work. Our analysis and bid evaluation take place through consistent communication with subcontractors throughout the entire bidding process.

Our outreach efforts include the following activities:

- Conduct and participate in Subcontractor Outreach Events to share project information and further encourage local businesses and worker participation.
- Keep local businesses and workers that express interest informed of the project status through email and phone conversations so that they are ready to pursue project opportunities as they arise.
- Place Bid Notices in local publications
- Distribute multiple bid, pre-bid, outreach event, and technical work session notifications to local organizations and businesses. These include, but are not limited to, the Associated General Contractors, Associated Builders and Contractors, Newport Beach Chamber of Commerce and Costa Mesa Chamber of Commerce.
- Conduct targeted outreach directly to hundreds of local businesses in our databases.
- Conduct targeted outreach directly to local businesses in outside databases, such as the California Department of General Services; the Small Business Administration's (SBA's) Certified 8(a) Program, California Public Utilities Commission (CPUC) Supplier Clearinghouse, California Unified Certification Program (CUCP/Caltrans), and the Minority Supplier Development Council (MSDC).

For added bid coverage, through our local memberships, Balfour Beatty provides notification and outreach to the local agencies at multiple project tiers is a priority. Any gaps in coverage after bid submission are first targeted directly to local businesses and workers to ensure additional participation is achieved.

Maximum Inclusion of Local Hires

Balfour Beatty is committed to maximum participation of local hires in project opportunities throughout all phases of the project. To that end, we inform, provide referrals, and educate interested individuals on how to best participate in project opportunities.

Such steps may include:

- Participate in local worker outreach events to inform District residents in the construction industry of upcoming work opportunities.
- Coordinate with workforce organizations, apprenticeship programs, and community-based organizations supportive of local construction workers.
- Coordinate with Orange County Building & Construction Trades Council for notification to all trades.
- Throughout the project, refer interested District residents to referral programs, subcontractors, apprenticeship programs, and local workforce organizations

Balfour Beatty uses LCPTracker to proactively track weekly progress, prepare Local Residents Status Reports, track residents by individual subcontractor and report on the demographics of all worker categories. From the Pre-Job Conference where all stakeholders are advised of the program requirements and open to ask questions to Letters of Assent and final reporting of Labor Hours all project participants will be supported in achieving Labor Compliance for the project with workshops on registering with the Unions, hiring procedures (core employees), how to utilize the project forms to track Local and Targeted hires, prevailing wage, payment practices and fringe benefits, etc.

The Balfour Beatty team is familiar with working with the Department of Industrialized Regulation (DIR) and internally utilize LCPTracker software to run certified payroll weekly and monthly reports, discuss participation ratios at project meetings and if necessary, work with local trade union representatives and subcontractors' to implement manpower schedules and individualized corrective action plans to achieve maximum participation.



Poway Unified School District
Westview High School Theater

**10. PROPOSED METHOD TO
ACCOMPLISHED THE WORK**

11.

**PRICING AND
CONTINGENCY**

Balfour Beatty

11. Pricing and Contingency

Developing the GMP shall include all DSA-approved plans and specifications consistent with the Construction Services Agreement and in accordance with the provisions of Education Code section 17406 and related sections. We will reference any other project specific details, addendums, and any project reports to ensure all documents have been included in the bid documents for final development of the GMP. Balfour Beatty prides itself on being completely transparent during the entire project. Working diligently with the architect and District stake holders to ensure they are apprised of preconstruction deliverables with respect to having an accurate project estimate, constructability solutions, and the project procurement and outreach, including the bidding process. Subcontractor bids will be available at the request of the district at any time.

During preconstruction Balfour Beatty's team will work with the district to establish the proper allowances if necessary and based on project specific items and on any potential scope related issues or District requests.

Our goal for contractor contingencies will be to minimize them during the preconstruction process, per exhibit 1 & 2 of the CSA we recommend an initial 5% contingency for new construction work on an existing campus to plan for potential unforeseen scenarios, however look to reduce it during preconstruction to 3% or lower depending on final clarification to the design documents and site analysis information. It is imperative to establish these contingencies to protect the District from any potential unknown increases during the duration of the project. In the event there is a savings on any aspect of the Project, such savings shall be added to the District Contingency and expended consistent with the District Contingency. In addition, any portion of the Contractor Contingency and/or Errors and Omissions Allowance remaining after completion of the Project shall be added to the District Contingency and returned if not used.

General Conditions cost, shall include those items listed in the RFP section 12 but are not limited to the Project labor (full time Project Manager, Superintendent and Project Engineer on-site,

part-time Project Accountant, part time scheduler to update project schedule, and weekly safety visits. Further, a Project Executive is assigned to be a resource to the project as necessary). Our project labor includes burden, field superintendent trucks, vehicle fuel, management vehicle allowance, temporary Furniture, site field office , Mobile Phones, Computer Equipment, Office Supplies, Printers/Copiers, Postage/Shipping, Small Tools, Safety Equipment, Jobsite Signage, Project Closeout documents, etc. Approximate General Condition cost for a project this size will vary depending on the actual needs for this project, final staffing, and project durations, \$85k - \$95k per month, however, General conditions can be higher or lower depending on inclusions or exclusions.

Balfour Beatty's direct labor for preconstruction services will cover the following, Estimating, value-engineering, constructability, schedule, bidding and general administration. The intent is to establish a realistic project budget and estimate so that there are no surprises on 'Bid-Day' and the project can move forward as planned. Further, Balfour Beatty will perform ongoing and accurate construction cost estimating to confirm that the cost to perform the work does not exceed the construction budget.

Once the final GMP is procured, using our outreach approach and strategic bidding process, our goal is that the final project GMP falls within the established final project estimate and budget. During the project, ongoing costs will be tracked against the final GMP, with the support of our assigned estimators and project team.

Balfour Beatty has provided a sample summary GMP matrix to illustrate insurance and bonds to be applied once direct costs are determined based on actual subcontractor bids and GMP is finalized.

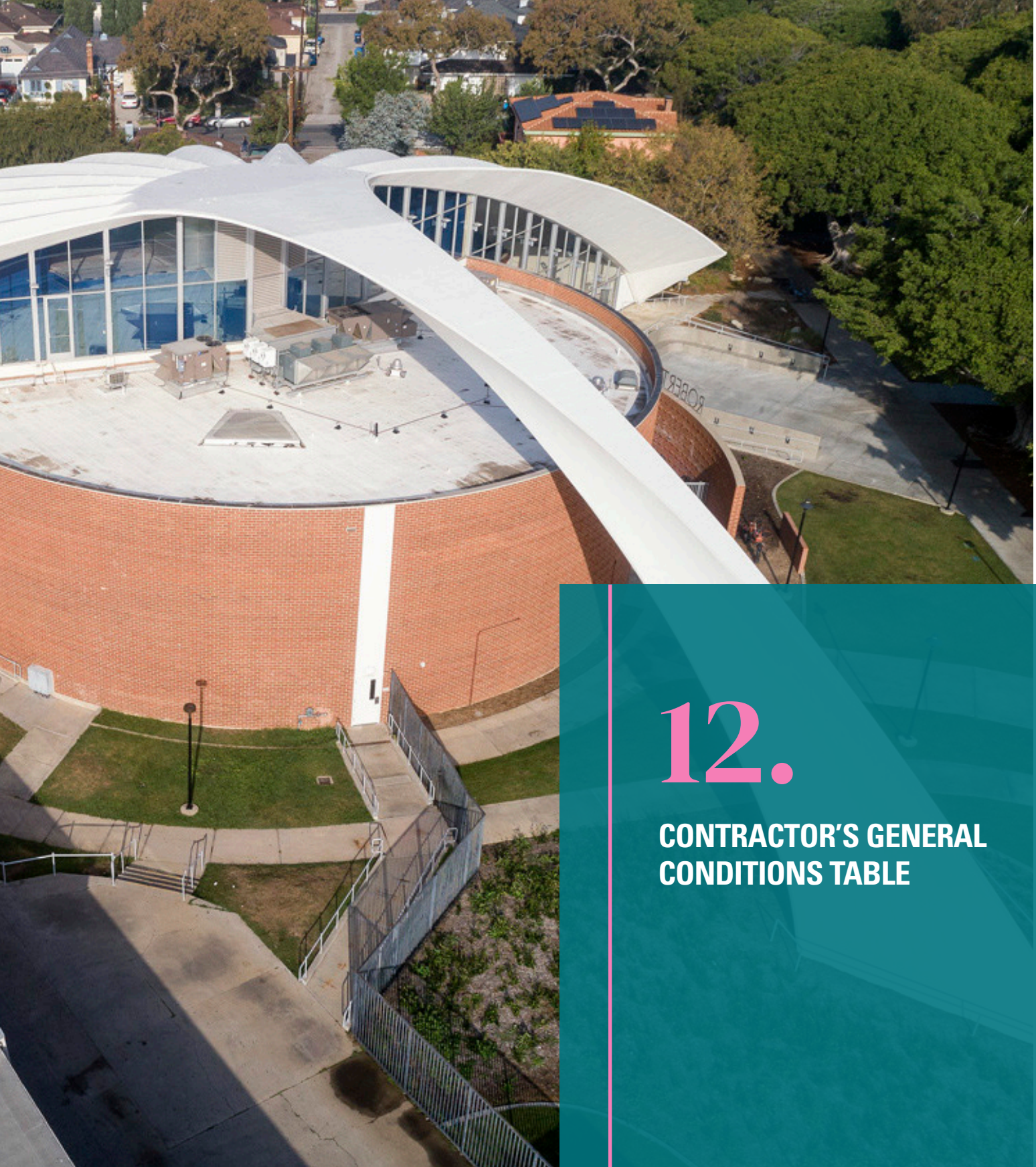
Balfour Beatty has provided a sample summary GMP matrix to illustrate insurance and bonds to be applied once direct costs are determined based on actual subcontractor bids and GMP is finalized. See Next Page ►

11. Pricing and Contingency

Balfour Beatty GMP Breakdown Ranges

Item Description	Estancia HS Theater	Notes
LLB Entity Fee	3.5%-3.75%	
Preconstruction Fee	\$55k- \$65k	Base on \$33m project cost
Special Conditions (if any)		None currently
General Conditions	\$85k- \$90k	Depending on inclusions & exclusions
Bonds and Insurance	1.0%	
Contractor Contingency	3%-5%	Depending on final scope
District Contingency	3%	Per RFP, Section 3.2
General Liability/Worker's Comp Insurance	\$1.04%-1.10%	
Builders Risk Insurance	.70%-.75%	





12. CONTRACTOR'S GENERAL CONDITIONS TABLE

12.

CONTRACTOR'S GENERAL CONDITIONS TABLE

Culver City Unified School District
Robert Frost Auditorium

Balfour Beatty

12. Contractor's General Conditions Table

Contractor's General Conditions General Requirements Table (Balfour Beatty)	
Supervision/Staff	Amount
Operations Oversight/Support	\$ 72,000
Project Executive	\$ 49,134
Project Manager	\$ 204,000
Project Superintendent	\$ 220,257
Project Engineer	\$ 142,800
Scheduling	\$ 20,000
Estimator	\$ 25,200
Constructability Reviewer	\$ 4,800
Quality Control Manager	\$0
MEP Coordinator	\$0
Field Engineer	\$0
Draftsman / Detailer	\$0
BIM Manager/Coordinator	\$ 20,000
Record Drawings	\$0
Field Accountant - (Project Administrator)	\$ 13,554
Labor Compliance Manager	\$0
Time Keeper / Checker	\$0
Secretarial / Clerk Typist	\$0
Independent Surveyor	\$ 5,000
Safety, Health & Environment Department	\$ 38,500
Administration	\$ 32,500
General Management	\$ 74,989
Legal	\$ 55,000
Accounts Payable	\$ 42,000
Accounts Receivable	\$ 40,080
Banking etc.	\$ 28,800
Field Offices for GC, Inspector, and Owner	
Office Trailer/Rental, Set-up, Tear-down, Relocation - 12 x 60' for Contractor	\$ 40,650
Office Trailer/Rental, Set-up, Tear-down, Relocation - 24 x 60' for District Construction Manager and Inspector and on-site meetings.	\$ 53,000
Office Furniture/Equip/Computers	\$ 10,000
Telephone/ Data Installation	\$ 8,550
Telephone/Data Monthly Charges	\$ 9,500
Elect Power Installation	\$ 15,000
Elect Power Distribution Wiring	\$ 20,000
Water Service - Installation	\$ 3,000
Heating & Cooling Cost	\$ 5,000
Light Bulbs & Misc. Supplies	\$0

12. Contractor's General Conditions Table

<u>Contractor's General Conditions General Requirements Table (Balfour Beatty)</u>	
Recycling/Trash Dumpster Removal/Hauling	\$ 5,000
Maintenance Services - Office Toilets	\$ 19,000
Drinking Water/Coffee	\$ 2,850
Company Vehicle / Fuel	\$ 9,500
Company Allowance	\$ 28,500
Equipment - Copier	\$ 12,350
Mobile Phones	\$ 8,550
Mobile Phone Tablets	\$ 14,250
Computer Equipment/Supplies	\$ 11,400
Office/Trailer Supplies	\$ 5,525
Documents/Records/Misc.	
Xerox Copies -	\$0
Electronic Drawing Transfer	\$0
Drawings & Specifications - Printing - Reproductions	\$ 1,500
As-Built Drawing Reproduction	\$0
Postage/Shipping	\$ 500
Project Photos / Open Space	\$ 6,600
Closeout Documentation	\$ 5,986
Ceremony / Meetings	\$ 5,000
Permits / License	\$ 600
Jobsite Operations	
Storage Trailer & Tool Shed Rental	\$0
Safety/First Aid Supplies	\$ 2,500
Fire Fighting Equipment	\$ 50
Security Guard	\$0
Temporary Parking	\$0
Watchman Services	\$0
Small Tools	\$ 2,500
Safety Signage	\$ 3,500
Office Dumpster	\$ 3,800
Other	
Subcontractor Bond or Default Insurance	Unknown Until Bid Time
Bidding Cost	\$ 5,000
Facility Operator / Training	\$0
Safety Inspections	\$0
Drug Testing	\$ 497
Collaboration Video Equipment (Per Addendum 4)	\$ 20,000



Torrance Unified School District
North High School Performing Arts Center

13.

OTHER INFORMATION

Balfour Beatty

BEYOND CONSTRUCTION

Giving Back to the Community

We have been collaborating with owners to build more than projects – we’re building futures, and communities where we spend our leisure time. We support the communities across California where we live and work, which includes involvement in and contributions to the education funds, supply drives, and other philanthropic endeavors of the school districts we serve. Southern California is home to our proposed team members and they are constantly looking for avenues to collaborate with the staff at the schools we work on while involving students as best as we can. Whether its raising money, awareness, or stepping in to get our hands dirty - we’re a team committed to helping out and giving back!

Below are a few examples of our commitment to our communities:

ACE Mentoring: ACE Mentoring is a nationwide program that engages high school students that are interested in pursuing a career in Architecture, Construction and Engineering. We worked with volunteer campus staff, architects, and other industry volunteers bi-weekly here on our jobsite. Every meeting would start with a job walk and for the next 2 hours would work on a project of their own. The students were given first-hand experience on how a project is built. From design to construction and everything in between. The students also took on a mock project. They designed and presented on it as if they were really going to have it built.



Sharefest Workday: Sharefest Workday is a local South Bay non-profit organization that gives back to schools in so many ways. Over the past 11 years we have partnered with Sharefest in its annual community building day where Balfour Beatty volunteers are mobilized into the community to work on projects designed to meet tangible needs. Just last year, Balfour Beatty raised over \$170,000 for Sharefest at our sponsored golf tournament, which benefits numerous school sites through out the South Bay.



Student Scholarships: Beyond Sharefest Workday, Balfour Beatty extends their commitment to education by using the remaining money raised at the Golf Tournament to support students attending Sharefest’s Summer Youth Development Academy for middle and high school youth. Additionally, Balfour Beatty gave a total \$5,000 in scholarships for local graduating seniors who demonstrate strong academic performance, service to the community, leadership, teamwork, responsibility, and integrity. Since 2010, Balfour Beatty Construction has:



- Raised \$713,000 for Sharefest community projects
- Mobilized 1,023 volunteers to give back
- Provided \$913,360 worth of work for schools
- Given \$24,000 in student scholarships

Habitat for Humanity: For the past three years we have not only raised money in support of Habitat for Humanity’s vision for a world where everyone has a decent place to live, but also don hard hats, gloves and boots and be among one of the of first groups of volunteers to help build 11 new homes in the Logan Heights neighborhood of San Diego. We are proud to not only participate in this worthy cause, but to also raised over \$35,000 through various fund-raising efforts to support San Diego Habitat for Humanity.



Make A Wish Foundation: In typical fashion, employees with Balfour Beatty helped make a special birthday at a South Bay school. Not only was it Jose Montano’s 11th birthday, it was a day that Jose’s wish for a brand new playground at his school for his fellow classmates came true.



Adopt-a-Family: The holidays are over, but for many, the “gifts of the season” will last much longer thanks to our first annual Adopt-a-Family program. Many Balfour Beatty employees participate in this inaugural event and have successfully raised thousands of dollars for gifts for less fortunate families throughout Southern California.



Green Apple Day: Green Apple Day of Service, hosted by the national U.S. Green Building Council, is one day where advocates from across the country and around the world come together in support of healthy, sustainable schools by taking real action in their communities. Balfour Beatty has participated in this Day of Service for the past 6 years.



Valentines for Vets: We participate in the annual “Valentines for Heroes” to show our appreciation to our nation’s Veterans. With participation of students from within the school districts we build in, our employees distribute new magazines, crossword & word search puzzles, decks of playing cards and more!





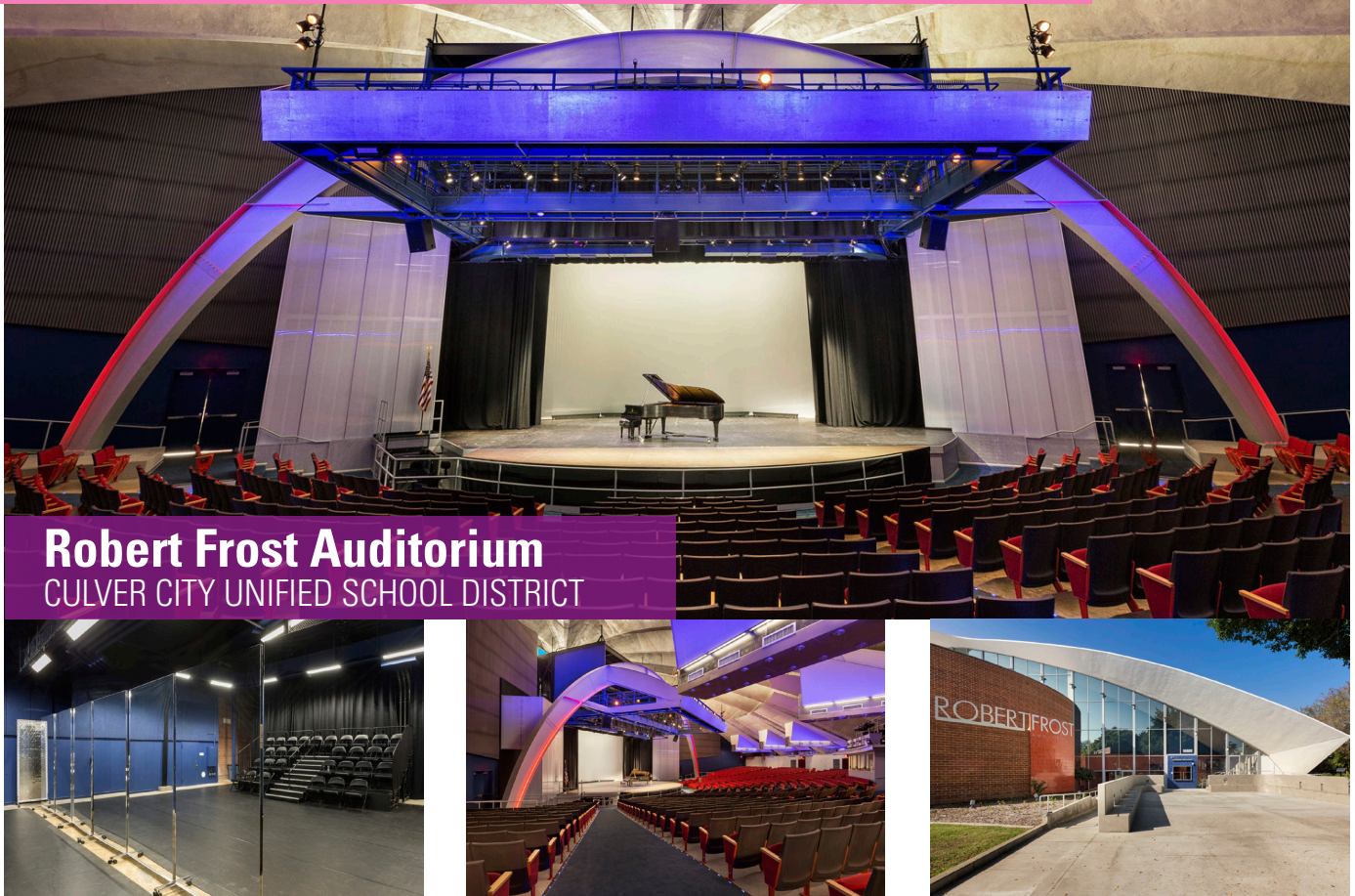
Culver City Unified School District
Egdewood High School Event Center

14.

APPENDICES

Balfour Beatty

Case Study: FINISHES, FIXTURES AND EQUIPMENT (FFE)



Robert Frost Auditorium
CULVER CITY UNIFIED SCHOOL DISTRICT

During the height of construction for the Robert Frost Auditorium in Culver City Balfour Beatty was asked to assist in obtaining Finishes, Fixtures and Equipment. Theaters have a unique FF&E list ranging from PAR lights to work shops. The theatrical consultant provided us with a list of items the District wanted for their newly remodeled theater. Upon review we identified only one item that could not be purchased with public funds, a \$1,000 gift card to Home Depot. With that line item removed we published a bid for specialties or theatrical companies to procure, deliver, unbox, and haul away shipping materials.

Three bidders responded with the low apparent bidder coming in around \$850,000. With an executed contract in hand BTC Entertainment set out to acquire every item. Nearly all items on the list were ordered, only a few had newer model numbers. We worked with BTC for site access and delivery over the course of a couple weeks.

The big ticket item on the list was something I had never experienced. A trip to the Steinway Selection Room in Downtown Los Angeles accompanied by two Professors from Loyola

Marymount College to review and select a Concert Grand Piano. I heard the difference between the individual pianos. Where one piano had a raspy sound others had sharper tones and smoother notes. I was amused at my rendition of Chopsticks but humbled by excerpts from Chopin, Dvorak and other works I could not recognize.

The District used their personnel to assemble some of the larger equipment. Table saws, bench grinders and similar items started filling the work benches and open areas. Lighting systems and controllers dotted the catwalk at every possible location. Additional equipment soon filled the storage room and the Black Box Theater. Empty dressing rooms now had furniture for clothes, make up and props.

In the end we closed out a remarkable project and made many friends. I am grateful for the opportunity to be a part of the most complex remodel I have ever done. The Frost Auditorium is a powerful statement from both the architectural and structural concepts. The modernization will benefit the community and students for decades to come.



Click or Scan QR
Code to watch testimony
about this project!



Western Wall & Ceiling Contractors
Association WWCCA Project of the Year 2019



Hoover High School Theater

SAN DIEGO UNIFIED SCHOOL DISTRICT

Total Project Value

\$49,330,354

Project Relevancy



Lease-Leaseback Delivery



Art/Music Facilities



Performance Hall



K-12 Education Facility



Preconstruction Services



Local Trade Outreach &
Skilled/Trained Workforce



Multiple Projects / Phases



Occupied Campus

Scope of Work:

Paying respectful homage to the original buildings and elevating the school's presence along well-trafficked El Cajon Boulevard in San Diego, the Hoover High School project stands as a welcoming new threshold to the campus. This 85,000 sf lease-leaseback project included the **demolition of the original 1930s theater** and construction of a **new state-of-the-art 500-seat theater** and three-story classroom building on an **active, 2,200-student campus**. Spanish architecture meets old-fashioned schoolhouse style, honoring the school's history with modern, energy efficient design. The **technologically advanced theater** is a valuable addition to the school and the local community, equipped to host a range of high school activities and public events. The theater includes a box office with **professional studio light controls, a shade structure, a concierge desk, modern performance stage, stage lighting, red curtains, a control room and a stage camera** that streams the show live to a front lobby TV.

Preconstruction Dates: No Precon

Construction Dates: April 2018-August 2020 | **Delivery Method:** Lease-Leaseback

Preconstruction Cost: N/A | **Lease-Leaseback Services:** \$46,330,354

Contingencies: \$0 | **Allowances:** \$1,00,000

Owner Reference: Rick Mortazavi, Lead Construction Manager
2351 Cardinal Lane, Building M, San Diego CA 92123
e. rmortazavi@sandi.net | p. (858) 225-9923

Staffing:

Balfour Beatty- Mark Schull (Project Manager), Wayne Kibbe (General Superintendent), Daniel Jaimes (Assistant Project Manager), Will Groff (Assistant Superintendent)

Architect- AVR P

Subcontractors- Rocky Coast Builders, Brady Company, Southland Industries, Schindler Elevator Corporation, ACCO Engineered Systems



SAN DIEGO UNIFIED SCHOOL DISTRICT

PHYSICAL PLANT OPERATIONS CENTER – 4860 Ruffner St, San Diego, CA 92111

(858) 637-6266

FAX (858) 573-5881

FACILITIES PLANNING & CONSTRUCTION
Construction Management Office

June 29, 2020

Mr. Brian Cahill-

I am writing to thank you for the great job Balfour Beatty has done on the \$47M Lease-Leaseback project at Hoover HS. The entire Balfour Beatty team has proven to be hard working, knowledgeable, professional and very cooperative throughout the Hoover HS project. In my 17 years serving as a Construction Manager at SDUSD I can honestly say that Balfour Beatty is the best contractor I have worked with. The District has been particularly impressed with the knowledge, abilities and work ethic of Superintendent Wayne Kibbe. The Hoover HS project is almost complete now and it appears certain to be delivered before the contract required date of August 5. This is a beautiful project that the District can be proud of for many decades to come!

We look forward to working with Balfour Beatty again soon on future projects.

Sincerely,

A handwritten signature in black ink that reads "Rick Mortazavi".

Rick Mortazavi
Lead Construction Manager
Facilities Planning and Construction
San Diego Unified School District



Canyon High School Performing Arts Center and Auditorium

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT

Total Project Value

\$17,231,503

Project Relevancy



Lease-Leaseback Delivery



Art/Music Facilities



Performance Hall



K-12 Education Facility



Preconstruction Services



Local Trade Outreach &
Skilled/Trained Workforce



Multiple Projects / Phases



Occupied Campus

Scope of Work:

The new Performing Arts Center (PAC) brings innovation and beauty to the school's campus with its many features including a ticket office, seating for an **audience of 450, an orchestra pit, a control room, a main stage, a scene shop and a drama classroom**. The new PAC also brings **state-of-the-art theater technology** into the hands of students, staff, and the public via **Digital Audio Network Through Ethernet (DANTE)** as well as an **audio/video system with Electronic Theatre Controls (ETC) lighting with dimming controls**. The technology not only creates a learning environment for students, it supports the many community performances that will take place in the beautiful new facility. Theatrical crews are provided access to **box boom areas passing between main theater and stage areas**.

In addition to the new performing arts center, our team performed modernizations for the auditorium and Building Q, tennis court and student parking lot resurfacing, and ADA compliance enhancements.

This challenging project didn't interfere with the project team's ability to keep team members safe. The project achieved more than 85,000 hours without lost time due to injury!

Preconstruction Dates: July 2014 - August 2014 (Informal Preconstruction Services)

Construction Dates: September 2014 - April 2016 | **Delivery Method:** Lease-Leaseback

Preconstruction Cost: N/A | **Lease-Leaseback Services:** \$17,247,374

Contingencies: \$740,440 | **Allowances:** \$

Owner Reference: Mike Otavka, Director of Facilities

21380 Centre Pointe Parkway, Santa Clarita, CA 91350

e. motavka@hartdistrict.org | p. (661) 753-5740 x274

Staffing:

Balfour Beatty- Dennis Kuykendall (Sr. Project Manager), Tony Spagnolo (Superintendent), Wayne Roemhild (Project Manager), Jackie Smith (Assistant Project Manager)

Architect- Little Architects

February 25, 2016

Mr. Brian Cahill

President

Balfour Beatty Construction,

California Division

10620 Treena Street, Suite 300

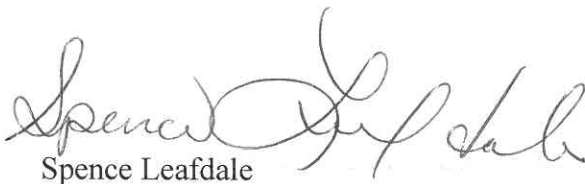
San Diego, CA 92131

Mr. Cahill,

Recently, as Chairman of the William S. Hart Union High School District (Hart District), Measure S.A. Citizens' Oversight Committee, I participated in a tour of the new Performing Arts Center being constructed, by your company, on the campus of Canyon High School. The tour was conducted by Wayne Roemhild, Senior Project Manager of your company. I am delighted to report to you that Roemhild provided a very fine and thorough tour. I found him to be an engaging and pleasant man. His positive and professional representation of Balfour Beatty was remarkable. Clearly Roemhild was very knowledgeable of the project and the importance of the project to the Hart District, students and community. His descriptions and explanations of the building and project were both thorough and understandable. Answers to my direct questions were clear and complete and when necessary detailed.

Respectfully and specifically I request that you cause this commendatory letter to be personally served to Roemhild and that he be commended and thanked for his actions and efforts. Please have a copy of this letter included in his personnel package and have it referred to in his next evaluation.

Regards,



Spence Leafdale



Edgewood High School Events Center

WEST COVINA UNIFIED SCHOOL DISTRICT

Total Project Value

\$28,182,431

Project Relevancy



Lease-Leaseback Delivery



Art/Music Facilities



Performance Hall



K-12 Education Facility



Preconstruction Services



Local Trade Outreach &
Skilled/Trained Workforce



Multiple Projects / Phases



Occupied Campus

Scope of Work:

The recently completed Edgewood High School Event Center project began with the demolition of the existing pool and pool pump house, clean and grub, over excavation, and grading for new event center buildings and pool. Once the site was cleared, new construction began and included a **ticket building**, concession stand, coaches offices, locker rooms, restrooms, storage, weight training room, **classrooms**, **career and technical education (CTE) classrooms**, multi-purpose room, gymnasium with telescoping bleachers, **media room**, solar panels, and all corresponding site-work.

Preconstruction Dates: July 2018 - October 2018 | **Delivery Method:** Lease-Leaseback

Construction Dates: October 2018 - June 2020

Preconstruction Cost: \$48,000 | **Lease-Leaseback Services:** \$27,847,177

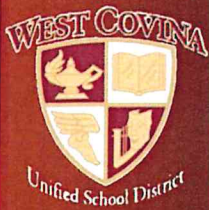
Contingencies: \$2,518,770 | **Allowances:** \$250,000

Owner Reference: David Larkin, Director of Facilities and Capital Projects
1717 W Merced Ave, West Covina, CA 91790
e. dlarkin@wcusd.org | p. 626.939.4600

Staffing:

Balfour Beatty- Arnold Arsenault (Sr. Project Manager), Sam Fakh (Project Manager), Zach Zavilla (Superintendent), Michele Earley (Assistant Superintendent)

Architect- PBK WLC



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TRUSTEES**

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Monarrez**
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**Charles D.
Hinman, Ed.D.,**
Superintendent

West Covina Unified School District

July 24, 2020

To Whom it May Concern:

It is with great pleasure that we provide this letter of reference to commend Balfour Beatty on their work on the recently completed state-of-the-art Events Center and Aquatics Sports Complex at Edgewood High School using the Lease-leaseback delivery method. The entire Balfour Beatty team has proven to be hard working, knowledgeable, professional, and very cooperative throughout the entire project.

The Events Center and Aquatics Sports Complex was designed to reimagine sports at the Edgewood campus featuring a brand new 50 meter by 25 yard Olympic swimming pool, auditorium, dance studio and career technical education classrooms for video production, game design and more. The project posed some challenges for the team and Balfour Beatty rose to the occasion providing unique solutions to the satisfaction of West Covina Unified School District. This is a beautiful project that the District and our community can be proud of for many years to come!

It takes talented and dedicated leaders, like Wayne Roemhild, Sam Fakih, and Michele Earley to build these facilities that are safe and designed to promote robust learning environments. These individuals are always available to answer my questions. My Board and community leaders have always been impressed by their professionalism and their determination in creating an injury free environment during construction.

Sincerely,

Drew Passalacqua, Ed.D.
Assistant Superintendent
West Covina USD



Torrance High School Modernization and Auditorium

TORRANCE UNIFIED SCHOOL DISTRICT

Total Project Value

\$44,310,740

Project Relevancy



Lease-Leaseback Delivery



Art/Music Facilities



Performance Hall



K-12 Education Facility



Preconstruction Services



Local Trade Outreach &
Skilled/Trained Workforce



Multiple Projects / Phases



Occupied Campus

Scope of Work:

Our work at Torrance High School lies primarily in the restoration and modernization of the historic buildings on the High School's campus. This project (originally built in 1917) required restoration and modernization work that highlighted and preserved the rich history of the campus and its buildings rather than cover it up.

This project lasted for a full 2-years over multiple phases to ensure minimal disruption to campus life. The modernization of 18 different buildings, equalling 286,653 square feet, included a typical scope of work including ADA upgrades across the entire campus, window replacements, lighting and fire alarm upgrades, painting and flooring, HVAC and ventilation upgrades throughout the campus including gymnasium, auxiliary gym, **full theater relocation and upgrade**, administration building and multi-purpose building as well as classrooms throughout, and installation of 2 new 2-story elevators. Interior renovations included installation of new marker boards, tack boards and projection screens, upgraded restroom facilities, flooring, painting and upgrades to finishes.

Preconstruction Dates: July 2013 - April 2015

Construction Dates: April 2015 - May 2017 | **Delivery Method:** Lease-Leaseback

Preconstruction Cost: \$296,630 | **Lease-Leaseback Services:** \$44,014,110

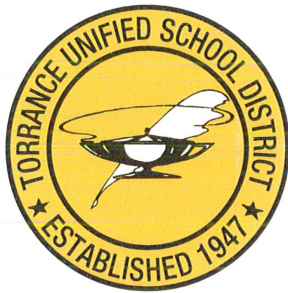
Contingencies: \$3,933,700 | **Allowances:** \$0

Owner Reference: Dr. George Mannon, Superintendent (retired)
2335 Plaza Del Amo, Torrance, California 90509
p: (310) 480.4606 | e: gwmannon@gmail.com

Staffing:

Balfour Beatty- Bryan Osbourne (Project Manager), Jeff Hammond (Superintendent), Trevor Perry (Superintendent)

Architect- Westber + White, Inc. Architects and Planners



TORRANCE UNIFIED SCHOOL DISTRICT

2335 PLAZA DEL AMO
P.O. BOX 2954
TORRANCE, CALIFORNIA 90509-2954

TELEPHONE (310) 972-6500
www.tusd.org

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TERRY RAGINS

**SUPERINTENDENT
OF SCHOOLS**
GEORGE W. MANNON, Ed.D.

October 7, 2019

To Whom It May Concern:

I wanted to take this opportunity to address the positive professional relationship between the Torrance Unified School District and Balfour Beatty Construction. I have had a long term relationship with the Balfour Beatty team for several years related to construction management services. Balfour Beatty from pre – construction, value engineer planning through construction and into the close out process has been exemplary. T.U.S.D. has modernized 30 schools, built two stadiums and modernized two stadiums, built three auditoriums and modernized one, built seven middle school gyms, an aquatic center, and constructed one and a half new schools under their services.

Obviously, they are very skilled in the construction process. However, their communication skills with staff and the community is invaluable during a large construction process. They answer all questions from staff members and community members. In our pre-construction meetings at school sites, that are about to begin construction, they explain the project and give information on who to call if you have a question or complaint to neighbors. They also send out a periodic newsletter to neighbors explaining to them of construction progress.

If you have any questions, about our experiences with Balfour Beatty, please contact me at 310-972-6001.

Sincerely,

George W. Mannon, Ed.D.
Superintendent



Mira Mesa High School Music Building

SAN DIEGO UNIFIED SCHOOL DISTRICT

Total Project Value

\$43,266,739

Project Relevancy



Lease-Leaseback Delivery



Art/Music Facilities



Performance Hall



K-12 Education Facility



Preconstruction Services



Local Trade Outreach &
Skilled/Trained Workforce



Multiple Projects / Phases



Occupied Campus

Scope of Work:

A new two-story 17,000 sf classroom building with 14 new classrooms was constructed at the location where 22 portable classrooms were removed. A **single-story band and orchestra building** was also constructed and included a 14,800 sf building with two separate classrooms for band and orchestra with instrument and uniform storage, lockers, an ensemble practice room, individual practice rooms, a music library, and faculty offices. Modernization efforts for the existing buildings included non structural partition re-alignments to create six new classroom spaces within areas of Buildings 200, 300, and 400; improvements to exterior building envelopes, central quad, and covered lunch areas; hardscape and landscape improvements; technology, electrical, mechanical, plumbing, and fire safety improvements; modifications to the pedestrian access to the campus, including relocating the existing perimeter security fence; and installation of a new communication system. Internal classroom upgrades included new site internet connection systems, fire alarm upgrades, new carpet and interior paint, repairs to address roof leaks, interior door relocations to improve accessibility, and new mirrors and sinks in the remaining portables on site.

Preconstruction Dates: Sept 2018 - Dec 2018 | **Delivery Method:** Lease-Leaseback

Construction Dates: December 2018 - September 2020

Preconstruction Cost: Included in Total | **Lease-Leaseback Services:** \$43,266,739

Contingencies: \$113,686 | **Allowances:** \$1,926,592

Owner Reference: Dave Machek, Construction Manager
4100 Normal Street, San Diego, CA 92103
p. 619.517.7131 | e. dmachek@sandi.net

Staffing:

Balfour Beatty- Kyle Frandsen (Project Manager), Dan Chandler (Sr. Superintendent), Daniel Jaimes (Assistant Project Manager), Esteban Guadiana (Project Engineer)

Architect- Architects Mosher Drew

4. Staffing Resources

Additional Resumes



JONATHAN RECALDE
Senior Project Engineer

4

Years of
Experience

**YEARS WITH BALFOUR
BEATTY**

23 years total experience
5 years w/ Balfour Beatty

EDUCATION / CERTIFICATIONS

- BS Business, National University
- OSHA 30-Hour Training
- Project Management Training
- Heavy equipment Operator
- Hazardous Material Handling
- DSA Project Inspector Previous
- First Aid/CPR



HOLA Performing Arts Center

Jonathan is a vibrant addition to any project team. He builds effective relationships with clients, design team members, subcontractors and usergroups that reflect and support the core values of success and collaboration. Exposed to the latest advancements in construction management, Jonathan understands the foundations to operational efficiency and is well versed in lean programs and tools including pull-planning, BIM, target Value Design initiatives, Constructware, Cost Tracking, and Digital Docs. As Sr. Project Engineer, Jonathan will assist with the daily planning and execution of the projects. He will support the team by proactively managing the budget by controlling expenses and administering billings. During preconstruction he will initiate setup of the job management system, assist with bid package preparation and solicit subcontractors/suppliers. During project startup and construction, Jonathan will assist with developing RFI and Submittal logs for tracking, and provide the team with the most accurate, up-to-date information to bridge communication gaps to where effective decisions can be made.

SELECT RELEVANT EXPERIENCE

HEART OF LOS ANGELES (HOLA)

- Performing Arts Building

**RANCHO SANTIAGO COMMUNITY COLLEGE
DISTRICT**

- Russell Hall Replacement- New Health Sciences Building at Santa Ana College

**SOUTH PASADENA UNIFIED SCHOOL
DISTRICT**

- South Pasadena High School Athletics / LLB
- South Pasadena High School Math and Science Buildings / LLB

ANAHEIM ELEMENTARY SCHOOL DISTRICT

- Roosevelt Elementary School / LLB

**LOS ANGELES COMMUNITY COLLEGE
DISTRICT (LACCD)**

- Pierce College North of Mall Ph 1A and 1B



Thank you for your
consideration.

Balfour Beatty

1501 Quail St., Suite 130
Newport Beach, CA 92660
www.balfourbeattyus.com

Dr. Phillips Center for Performing Arts

Balfour Beatty

1501 Quail St, Suite 130
Newport Beach, CA 92660
p. (949) 502-4000
e. alert@balfourbeattyus.com
www.balfourbeattyus.com



Culver City USD | **Robert Frost Performing Arts Center**



San Diego USD | **Hoover High School Theater**



Newport-Mesa
Unified School District

Newport- Mesa
Unified School District
2985 Bear Street,
Costa Mesa, CA 92626

Response for Request for Proposal/Qualifications
Lease-Leaseback Services for

Estancia High School Theater Project

FISCAL STABILITY SUPPORTING DOCUMENTATION



Certification

The Contractor Score is an empirical tool derived from the contractor's documented and verified information. It is based on objective calculations without subjectivity or bias. The main goal of Contractor Score is to provide a concise gauge whereby customers may evaluate the short-term liquidity and management capacity of the contractor relative to its own needs. It is not a bond nor guarantee of performance. The emphasis is on liquidity, working capital, leverage and profitability of the most recent fiscal year and fiscal quarter as it relates to the existing backlog. Available funds contributing to the liquidity may be internal or external.

Balfour Beatty Construction LLC

3100 McKinnon Street, 6th Floor
Dallas, USA-Texas 75201

Has a Contractor Score of

2500

Effective Date as of Latest Financial Statements Submitted

July 01, 2022

0 – 350 Weak

350 – 650 Fair

650 – 1000 Good

Over 1000 Excellent

Contractor Score GENERAL DISCLAIMER

This financial information has been prepared by CONTRACTOR SCORE for the purpose of providing interested parties with general information about the Company. The data included was derived from the books and records of the Company. Although such information is believed to present fairly the history and business of the Company, CONTRACTOR SCORE does not make any representation as to the completeness or accuracy of the contents of these financial metrics. CONTRACTOR SCORE, specifically, is only calculating data provided to CONTRACTOR SCORE by the Company. CONTRACTOR SCORE has, in no manner, attempted to verify the information provided to them.

Parties wishing to pursue business with the Company shall be responsible for the verification of any information upon which they may make any decisions.

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(b) BALFOUR BEATTY'S LETTER OF CREDIT

Classification: Confidential



Lloyds Bank plc
Ground Floor
10 Gresham Street
London, EC2V 7AE

Tel: 0207 356 1394

Fax: 0207 356 1393

Email: commercialclientservicing@lloydsbanking.com

02/02/2022

To Whom it May Concern,

Lloyds Bank is a wholly owned subsidiary of Lloyds Banking Group plc, which is listed on the London Stock Exchange. In common with other major UK banks, Lloyds Bank is regulated by the Prudential Regulation Authority and is authorised to act as a bank by the UK central bank, the Bank of England.

Lloyds Bank plc confirms it currently has a banking relationship with the Balfour Beatty Group of companies and we also confirm that as part of that relationship we currently extend credit facilities to Balfour Beatty. Lloyds Bank plc is currently one of several banks which together provide a committed GBP375m revolving credit facility to Balfour Beatty for general corporate purposes, expiring Oct 2024.

We are happy to confirm that as of today's date Balfour Beatty Group are considered good in the normal course to meet their business commitments and financial obligations. Following on, we are more than happy to provide a positive endorsement to the Group from a banking relationship standpoint.

This Bank is not a credit reference agency within the terms of Section 145 (8) of the Consumer Credit Act, 1974. Subject to the obligations of credit reference agencies under the Act, disclosure of the source and content of this opinion is not required.

Yours faithfully,

Max Jones
Relationship Director

For and on behalf of
Lloyds Bank plc

COMMERCIAL BANKING