

PROPOSAL & QUALIFICATIONS TO PROVIDE LEASE-LEASEBACK SERVICES ESTANCIA HIGH SCHOOL THEATER PROJECT

DUE: OCTOBER 11, 2022 | 2:00 PM



Erickson-Hall Construction
An Employee Owned Company

500 Corporate Drive
Escondido, CA 92029
RFP Contact: Penny Lawlor
760.796.7700 p | 760.796.7750 f
plawlor@ericksonhall.com

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EXECUTIVE SUMMARY



Erickson-Hall **Construction**

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Escondido, CA 92029
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EXECUTIVE SUMMARY

Established in 1998, Erickson-Hall Construction Co.'s focus is concentrated on providing comprehensive preconstruction, construction and post construction phase services to build and/or modernize California K-12 school facilities utilizing a full menu of alternative delivery processes, including Lease-Leaseback Project Delivery. The depth of our experience is extensive, encompassing a broad range of complex projects for school districts throughout Southern California. As lease-leaseback contractors, we work in partnership with Districts and their design teams to maximize construction value and quality standards within established budget and schedule parameters. Our performance on more than \$1 billion of successful project completions demonstrates our unwavering commitment to partner with the District, Pfeiffer Architecture and trade contractors to achieve District objectives. We offer extensive experience safely executing complex construction around the ongoing activities of a busy school campus while maintaining the integrity of the learning environment, as well as the safety of students, staff and campus visitors.

- **PROJECT TEAM** - Erickson-Hall's lease-leaseback team consists of seasoned construction professionals led by Justin Sinnott, a Certified Construction Manager and 20-year veteran of California school construction. We are committed to maintaining strong working relationship with the District and use creative thinking and innovative problem solving to foster a team environment, resolve issues and achieve project goals established for the Estancia High School Theater Project. Services performed for the District will be delivered from Erickson-Hall's onsite project team based out of our Orange County Office with support from our Escondido corporate headquarters.
- **TECHNICAL COMPETENCE** - Erickson-Hall is fully staffed with multi-disciplinary construction professionals offering comprehensive experience in all components of Lease-Leaseback Project Delivery, including project management, constructability reviews, value engineering analyses, building information modeling, construction planning, jobsite supervision, etc. All lease-leaseback services will be performed by our in-house staff. In-house resources include an extensive array of state-of-the-art construction technology, including but not limited to:
 - » Timberline Estimating & Accounting Software
 - » Procore Project Management Software
 - » Microsoft Project Scheduling Software
 - » Bluebeam Studio
 - » IPAD Digital Technology in the Field
- **PROPOSED METHOD TO ACCOMPLISH WORK** Erickson-Hall understands that Lease-Leaseback Project Delivery puts us in partnership with the District and Pfeiffer to maximize construction value and quality standards within budget and schedule parameters established for the

Estancia Theater Project. Immediately upon contract award, Erickson-Hall will begin working closely with Pfeiffer Architects to assist in developing design solutions which work best with the District's budget and program needs. Our team will provide detailed construction estimates at each stage of design and will perform value engineering analyses to assure District construction dollars are maximized. We will reach out to a minimum of four bidders to obtain real time pricing for the various categories of work while developing the project budget. During this process, we will have our staff and the subcontracting community produce constructability and scoping questions to assure we provide an extremely accurate costing analysis. We will provide initial baseline pricing, as well as progress pricing as the documents move through the design and DSA permitting process. The District will be provided with a variance report detailing changes in costs and the reasoning behind those changes. The initial baseline budget will be produced within four weeks of Notice to Proceed. Erickson-Hall will mobilize onsite as shown on the Site Utilization Plan included in this submission. Our focus will be on minimizing impacts to students and staff and to make sure Estancia High School continues to operate "business as usual" as we move throughout construction. Safety will remain our highest priority throughout the full course of construction. Erickson-Hall staff will be the first to arrive onsite and the last to leave the site every day. Early focus will be placed on long lead materials to ensure we manage the challenges of procurement in today's construction industry in order to have materials and equipment arriving on site when needed.

- **SUMMARY** - We are confident the District will enjoy Erickson-Hall's commitment to partnering with District representatives, Pfeiffer and subcontractors to achieve on time/on budget completion. Reputation, honesty, and integrity in our dealings with school districts, design teams and contractors serve as the foundation of our construction philosophy and ensure Newport Mesa Unified School District the best value for every construction dollar spent.

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Estancia High School
Theater Project

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IDENTIFICATION OF PROPOSER



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IDENTIFICATION OF PROPOSER

- Erickson-Hall Construction Co.
 - » A California Corporation | Employee-Owned
 - » Incorporated in May 1, 1998 | 24 Years in Operation
 - » David Erickson, Founding Principal | CEO
 - » Michael Hall, Founding Principal | COO
 - » David Jeffrey, CFO
 - » Mat Gates, President
 - » Bill Grundman, Executive Vice President
 - » Stephen Rogers, Vice President Operations
 - » Justin Sinnott, Vice President Orange/LA Counties
 - » Jim Fisher, Vice President, San Diego/Imperial Counties
 - » Mike Riley, Vice President Estimating
 - » Scott Hammond, Vice President Business Development
 - » Penny Lawlor, Vice President Marketing
 - » 177 Employees

OFFICE LOCATIONS

- **Los Angeles | Orange County Office**
12600 Westminster, Suite D
Santa Ana, CA 92076
714.532.1060 p

Services performed for Newport Mesa Unified School District will be delivered from Erickson-Hall's Orange County Office.

- **Riverside County Office**
11810 Pierce Street, Unit 150
Riverside, CA 92503
951.358.0738 p
- **Corporate Headquarters**
500 Corporate Drive
Escondido, CA 92029
760.796.7700 p | 760.796.7750 f
- **Imperial Valley Office**
216 E. 3rd Street
Imperial, CA 92251
760.355.1564 p

CALIFORNIA CONTRACTOR'S LICENSE

- Contractor License No. 751343
 - » Issue Date - July 3, 1998
 - » Expiration Date - July 31, 2024
 - » Classifications - A General Engineering Contractor | B General Building Contractor
 - » Certification - HAZ Hazardous Substances Removal
 - » Never Suspended | Never Revoked

DISTRICT PREQUALIFICATION

- Erickson-Hall has been prequalified through PQ Bids.
Prequalification Expiration Date: 2.17.2023



SAGE CREEK HIGH SCHOOL
PERFORMING ARTS CENTER

STAFFING RESOURCES



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STAFFING RESOURCES

Erickson-Hall employs a multi-disciplinary staff of approximately 180 seasoned construction professionals and administration staff. Each of our proposed team members offers extensive experience in preconstruction planning and construction phase execution of California school projects. Our experience includes assisting and supporting multiple California school districts in their efforts to achieve state agency approvals/funding during project planning, as well as simultaneous oversight of multiple projects in various stages of design and construction. Essential to our success has been our ability to streamline the DSA close-out process in the final stages of construction.

KEY PERSONNEL

Resumes are provided in Appendices

JUSTIN SINNOTT, CCM
VICE PRESIDENT/PROJECT EXECUTIVE

- Primary District Contact

BRIAN SKAJEM
SENIOR PROJECT MANAGER

- Primary District Contact

ROBERT LATHROP, JR.
SUPERINTENDENT
100% ONSITE DURING CONSTRUCTION

- Primary District Contact

MIKE BUDD
CHIEF ESTIMATOR

- Estimating Support and Value Engineering Analyses

REBECCA RITSEMA-HANASH
BIM MANAGER

- Clash Detection Support and Systems/Utility Layouts

CHRISTIAN MEJIA
PROJECT ENGINEER

- Submittals, Shop Drawing, Product Data

DVBE



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DVBE EXPERIENCE

Erickson-Hall has been successful meeting a broad range of participation goals on projects awarded to us by military, municipalities, school districts, and state agency clients. We work diligently to identify viable concerns during the bid process to ensure that these goals are met or exceeded. We are committed to achieving or exceeding SDSU's DVBE participation goals for the Lithium Research Hub/STEM Building Project. Our commitment to ensuring disabled veterans have the opportunity to participate in this project is demonstrated by our performance track record of achieving DVBE participation goals. Representative project examples include

- **CHP San Diego Replacement Center**
State of California General Services Department
- **Spring Valley Gymnasium and Teen Center**
City of San Diego
- **Oxford Academy**
Anaheim Union High School District
- **Albert Einstein Academy Charter Elementary School**
San Diego Unified School District
- **Escondido High School Creative Arts Addition**
Escondido Union High School District



"As we express our gratitude, we must never forget that the highest appreciation is not to utter words, but to live by them."

John F. Kennedy

FISCAL STABILITY



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FISCAL STABILITY

- Value of work currently under construction is approximately \$300 million in various stages of completion..
- The following documents are provided in this section per RFP requirements:
 - » Current Dunn & Bradstreet Report
 - » Audited Financial Statement - Year 2021
 - » Notarized Bonding Capacity Letter



RICHARDS CENTER FOR THE ARTS AT PALM SPRINGS HIGH SCHOOL

LIVE REPORT

**ERICKSON-HALL
CONSTRUCTION CO.**

Tradestyle(s): -

ACTIVE **HEADQUARTERS****D-U-N-S** 02-980-6572
Number:
Phone: +1 760 796 7700**Address:** 500 Corporate Dr, Escondido, CA, 92029, United States Of America**Web:** www.ericksonhall.com**Endorsement:** warnock@alliant.com**Exclude
from
Portfolio
Insight:**

Summary

KEY DATA ELEMENTS (Formerly: SCORE BAR)

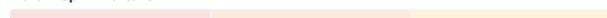
KDE Name		Current Status	Details
PAYDEX®	↑	73	11 days beyond terms
Delinquency Score	↓	73	Low to Moderate Risk of severe payment delinquency.
Failure Score	↑	61	Moderate Risk of severe financial stress.
D&B Viability Rating		4 6 B G	View More Details
Bankruptcy Found		N	
D&B Rating		1R3	1R indicates 10 or more Employees, Credit appraisal of 3 is fair

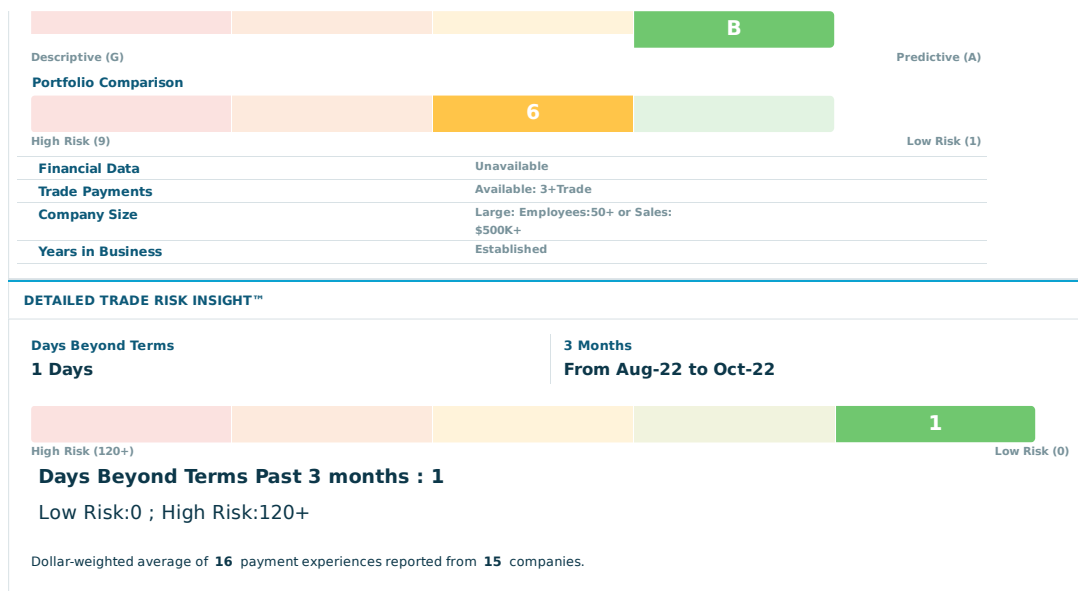
D&B RATING®**Employee Size****1R** : 10 employees and over

Current Rating as of 04/10/2009

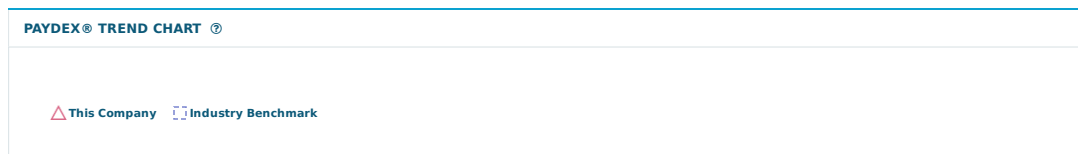
Risk Indicator**3** : Moderate Risk**D&B MAX CREDIT RECOMMENDATION®****MAXIMUM CREDIT RECOMMENDATION****US\$ 140,000**

The recommended limit is based on a moderately low probability of severe delinquency.

VIABILITY RATING SUMMARY®**Viability Score****Data Depth Indicator**



COMPANY PROFILE ⓘ		
D-U-N-S 02-980-6572	Mailing Address UNITED STATES	Employees 88
Legal Form Corporation (US)	Telephone +1 760 796 7700	Age (Year Started) 24 Years(1998)
History Record Clear	Website www.ericksonhall.com	Named Principal Dave Erickson , CEO
Date Incorporated 05/01/1998	Present Control Succeeded 1998	Line of Business Nonresidential construction
State of Incorporation CALIFORNIA		SIC 15420101
Ownership Not publicly traded		NAICS 236220



STOCK PERFORMANCE	
History	Performance
Daily High	P/E:
52-Week High	EPS:
	Div/Yield

WEB & SOCIAL POWERED BY FIRSTRAIN

-  How that \$59 million bond was spent for Hermosa Beach school construction projects [The Daily Breeze](#) 22-Sep-2022
-  Erickson-Hall Completes Los Alamitos High School STEM Building for 2022 - 2023 School Year [StreetInsider.com](#) 20-Sep-2022
-  On The Move: Erickson-Hall Welcomes Andrew Roseberry [Orange County Business Journal](#) 05-Sep-2022
-  San Diego County High School Moves Ahead on Career Tech Center [School Construction News](#) 24-Aug-2022
-  Erickson-Hall Welcomes Andrew Roseberry as Talent Acquisition Specialist [Morningstar](#) 28-Jul-2022
-  Independent Investigation of Carlsbad's Hope Elementary School Water Cross-Contamination Finished [NBC San Diego](#) 13-Jul-2022
-  Erickson-Hall Breaks Ground on Education Building at Rancho Buena Vista High School in Vista, CA [Morningstar](#) 29-Jun-2022
-  Man suspected of fatally striking construction worker at Whittier elementary school is arrested [Whittier Daily News](#) 23-Jun-2022
-  Fire board postpones action on new station contract [The Valley Roadrunner](#) 14-Apr-2022

ALERTS 🔔

Unread Severe	Unread	Today	Total
-	7	-	7

1-5 of 7

Status	Type/Description	Date
	Delinquency Risk Level Changed from Low to Low-Moderate	06/27/2022
	Delinquency Risk Level Changed from Low-Moderate to Low	04/25/2022
	Failure Risk Level Changed from Moderate-High to Moderate	04/18/2022
	Delinquency Risk Level Changed from Low to Low-Moderate	03/23/2022
	Failure Risk Level Changed from Moderate to Moderate-High	02/14/2022

LEGAL EVENTS

Events	Occurrences	Last Filed
Bankruptcies	0	-
Judgements	0	-
Liens	0	-
Suits	0	-
UCC	3	12/15/2020

OWNERSHIP

Subsidiaries	Branches	Total Members
-	2	3
This company is a Global Ultimate, Domestic Ultimate, Headquarters.		
	Global Ultimate	Domestic Ultimate
Name	ERICKSON-HALL CONSTRUCTION CO.	ERICKSON-HALL CONSTRUCTION CO.
Country	UNITED STATES	UNITED STATES
D-U-N-S	02-980-6572	02-980-6572
Others	-	-

The scores and ratings included in this report are designed as a tool to assist the user in making their own credit related decisions, and should be used as part of a balanced and complete assessment relying on the knowledge and expertise of the reader, and where appropriate on other information sources. The score and rating models are developed using statistical analysis in order to generate a prediction of future events. Dun & Bradstreet monitors the performance of thousands of businesses in order to identify characteristics common to specific business events. These characteristics are weighted by significance to form rules within its models that identify other businesses with similar

characteristics in order to provide a score or rating.

Dun & Bradstreet's scores and ratings are not a statement of what will happen, but an indication of what is more likely to happen based on previous experience. Though Dun & Bradstreet uses extensive procedures to maintain the quality of its information, Dun & Bradstreet cannot guarantee that it is accurate, complete or timely, and this may affect the included scores and ratings. Your use of this report is subject to applicable law, and to the terms of your agreement with Dun & Bradstreet.

Risk Assessment

D&B RISK ASSESSMENT

OVERALL BUSINESS RISK



Dun & Bradstreet thinks...

- Overall assessment of this organization over the next 12 months: **STABILITY CONCERNS**
- Based on the predicted risk of business discontinuation: **AVERAGE-RISK-OF-DISCONTINUED-OPERATIONS-OR-BUSINESS-INACTIVITY**
- Based on the predicted risk of severely delinquent payments: **LOW POTENTIAL FOR SEVERELY DELINQUENT PAYMENTS**

MAXIMUM CREDIT RECOMMENDATION

US\$ 140,000

The recommended limit is based on a moderately low probability of severe delinquency.

D&B VIABILITY RATING SUMMARY

The D&B Viability Rating uses D&B's proprietary analytics to compare the most predictive business risk indicators and deliver a highly reliable assessment of the probability that a company will go out of business, become dormant/inactive, or file for bankruptcy/insolvency within the next 12 months. The D&B Viability Rating is made up of 4 components:

Viability Score

Compared to All US Businesses within the D&B Database:

- Level of Risk:**Low Risk**
- Businesses ranked **4** have a probability of becoming no longer viable: **5 %**
- Percentage of businesses ranked **4**: **14 %**
- Across all US businesses, the average probability of becoming no longer viable:**14 %**

Portfolio Comparison

Compared to All US Businesses within the same MODEL SEGMENT:

- Model Segment :**Established Trade Payments**
- Level of Risk:**Moderate Risk**
- Businesses ranked **6** within this model segment have a probability of becoming no longer viable: **5 %**
- Percentage of businesses ranked **6** with this model segment: **9 %**
- Within this model segment, the average probability of becoming no longer viable:**5 %**

Data Depth Indicator

Data Depth Indicator:

- ✓ Rich Firmographics
- ✓ Extensive Commercial Trading Activity
- ✓ Basic Financial Attributes

Greater data depth can increase the precision of the D&B Viability Rating assessment.

To help improve the current data depth of this company, you can ask D&B to make a personalized request to this company on your behalf to obtain its latest financial information. To make the request, click the link below. Note, the company must be saved to a folder before the request can be made.

Request Financial Statements

Reference the FINANCIALS tab for this company to monitor the status of your request.

Company Profile:

Company Profile Details:

- Financial Data: **False**
- Trade Payments: **Available: 3+Trade**
- Company Size: **Large: Employees:50+ or Sales: \$500K+**
- Years in Business: **Established: 5+**

G

Financial Data

False

Trade Payments

Available:
3+Trade

Company Size

Large

Years in Business

Established

FAILURE SCORE FORMERLY FINANCIAL STRESS SCORE



- Low proportion of satisfactory payment experiences to total payment experiences

High Risk (1)

Low Risk (100)

- UCC Filings reported
- Composite credit appraisal is rated fair
- Higher risk legal structure
- High proportion of past due balances to total amount owing

Level of Risk Moderate	Raw Score 1497	Probability of Failure 0.17 %	Average Probability of Failure for Businesses in D&B Database 0.48	Class 3
---------------------------	-------------------	----------------------------------	--	------------

Business and Industry Trends

FAILURE SCORE

Industry Median Quartile

BUSINESS AND INDUSTRY COMPARISON

Selected Segments of Business Attributes

Norms	National %
This Business	61
Region:(PACIFIC)	33
Industry:CONSTRUCTION	34
Employee range:(20-99)	57
Years in Business:(11-25)	49

DELINQUENCY SCORE

FORMERLY COMMERCIAL CREDIT SCORE

73

High Risk (1)

Low Risk (100)

Proportion of slow payments in recent months

Higher risk industry based on delinquency rates for this industry

Increase in proportion of delinquent payments in recent payment experiences

Proportion of past due balances to total amount owing

Level of Risk Low-Moderate	Raw Score 533	Probability of Delinquency 3.41 %	Compared to Businesses in D&B Database 10.2 %	Class 2
--	-------------------------------------	---	---	-------------------------------

Business and Industry Trends

DELINQUENCY SCORE

Industry Median Quartile

BUSINESS AND INDUSTRY COMPARISON

Selected Segments of Business Attributes

Norms	National %
This Business	73
Region:(PACIFIC)	36
Industry:CONSTRUCTION	33
Employee range:(20-99)	82
Years in Business:(11-25)	43

D&B PAYDEX  High Risk (1) Low Risk (100) When weighted by amount, Payments to suppliers average days_beyond_terms ☐ High risk of late payment (Average 30 to 120 days beyond terms) ☐ Medium risk of late payment (Average 30 days or less beyond terms) ☐ Low risk of late payment (Average prompt to 30+ days sooner)		D&B 3 MONTH PAYDEX  High Risk (1) Low Risk (100) Based on payments collected 3 months ago. When weighted by amount, Payments to suppliers average 6 days beyond terms ☐ High risk of late payment (Average 30 to 120 days beyond terms) ☐ Medium risk of late payment (Average 30 days or less beyond terms)	
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Industry Median 72 Equals 12 Days Beyond Terms	☐ Low risk of late payment (Average prompt to 30+ days sooner)
Industry Median 72 Equals 12 Days Beyond Terms	

Business and Industry Trends

1542 - Nonresidential construction

△ PAYDEX
 ▮ Industry Lower Quartile
 () Industry Median Quartile
 * Industry Upper Quartile

Equals

D&B RATING			
Current Rating as of 04/10/2009		History since 09/25/1998	
Employee Size	Risk Indicator	Date Applied	D&B Rating
1R : 10 employees and over	3 : Moderate Risk	06/18/2002	1R4
Previous Rating		01/14/2002	1R3
Employee Size	Risk Indicator	10/16/2001	1R4
1R : 10 employees and over	4 : Higher than Average Risk	04/07/2000	CB4
		10/06/1998	CB3

Trade Payments

TRADE PAYMENTS SUMMARY (Based on 24 months of data)		
Overall Payment Behaviour 11 Days Beyond Terms Highest Now Owning: US\$ 25,000	% of Trade Within Terms 78% Total Trade Experiences: 45 Largest High Credit: US\$ 100,000 Average High Credit: US\$ 14,829	Highest Past Due US\$ 20,000 Total Unfavorable Comments : 0 Largest High Credit: US\$ 0 Total Placed in Collections: 0 Largest High Credit: US\$ 0

D&B PAYDEX 73 High Risk (1) Low Risk (100) When weighted by amount, Payments to suppliers average days_beyond_terms ☐ High risk of late payment (Average 30 to 120 days beyond terms) ☐ Medium risk of late payment (Average 30 days or less beyond terms) ☐ Low risk of late payment (Average prompt to 30+ days sooner) Industry Median 72 Equals 12 Days Beyond Terms	D&B 3 MONTH PAYDEX 76 High Risk (1) Low Risk (100) Based on payments collected 3 months ago. When weighted by amount, Payments to suppliers average 6 days beyond terms ☐ High risk of late payment (Average 30 to 120 days beyond terms) ☐ Medium risk of late payment (Average 30 days or less beyond terms) ☐ Low risk of late payment (Average prompt to 30+ days sooner) Industry Median 72 Equals 12 Days Beyond Terms
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BUSINESS AND INDUSTRY TRENDS

Based on 24 months of data

1542 - Nonresidential construction

△ PAYDEX

▮ Industry Lower Quartile

() Industry Median Quartile

* Industry Upper Quartile

	11/20	12/20	1/21	2/21	3/21	4/21	5/21	6/21	7/21	8/21	9/21	10/21	11/21	12/21	1/22	2/22	3/22	4/22	5/22	6/22	7/22	8/22	9/22	Current 2022
This Business	67	69	70	69	69	70	70	70	70	70	69	69	69	69	69	69	67	69	69	70	71	72	73	73

	11/20	12/20	1/21	2/21	3/21	4/21	5/21	6/21	7/21	8/21	9/21	10/21	11/21	12/21	1/22	2/22	3/22	4/22	5/22	6/22	7/22	8/22	9/22	Current 2022
Industry Quartile																								
Upper	-	78	-	-	78	-	-	78	-	-	78	-	-	78	-	-	78	-	-	78	-	-	78	-
Median	-	73	-	-	73	-	-	73	-	-	72	-	-	72	-	-	72	-	-	72	-	-	72	-
Lower	-	64	-	-	64	-	-	64	-	-	64	-	-	64	-	-	64	-	-	64	-	-	64	-

TRADE PAYMENTS BY CREDIT EXTENDED (Based on 12 months of data)			
Range of Credit Extended (US\$)	Number of Payment Experiences	Total Value	% Within Terms
100,000 & over	1	US\$ 100,000	100
50,000 - 99,999	1	US\$ 85,000	100
15,000 - 49,999	11	US\$ 275,000	70
5,000 - 14,999	4	US\$ 30,000	100
1,000 - 4,999	7	US\$ 11,500	63
Less than 1,000	10	US\$ 2,700	86

TRADE PAYMENTS BY INDUSTRY (BASED ON 24 MONTHS OF DATA)								
Collapse All Expand All								
Industry Category-	Number of Payment Experiences	Largest High Credit (US\$)	% Within Terms (Expand to View)	1 - 30 Days Late (%)	31 - 60 Days Late (%)	61 - 90 Days Late (%)	91 + Days Late (%)	
➤15 - Building Construction - General Contractors and Operative Builders	1	10,000	100	0	0	0	0	
1531 - Operative builders	1	10,000	100	0	0	0	0	
➤17 - Construction - Special Trade Contractors	2	35,000	85	0	15	0	0	
1742 - Drywall/insulate work	2	35,000	85	0	15	0	0	
➤34 - Fabricated Metal Products except Machinery and Transportation Equipment	2	40,000	0	50	36	0	14	
3442 - Mfg metal doors/trim	2	40,000	0	50	36	0	14	
➤37 - Transportation Equipment	1	20,000	0	0	0	100	0	
3724 - Mfg plane engine/part	1	20,000	0	0	0	100	0	
➤45 - Transportation by Air	1	250	100	0	0	0	0	
4513 - Air courier service	1	250	100	0	0	0	0	
➤48 - Communications	4	10,000	100	0	0	0	0	
4813 - Telephone communictns	3	500	100	0	0	0	0	
4812 - Radiotelephone commun	1	10,000	100	0	0	0	0	

▼50 - Wholesale Trade - Durable Goods	5	30,000	99	0	1	0	0
5031 - Whol lumber/millwork	2	15,000	97	0	3	0	0
5045 - Whol computers/softwr	1	30,000	100	0	0	0	0
5085 - Whol industrial suppl	1	20,000	100	0	0	0	0
5074 - Whol plumb/hydrionics	1	1,000	100	0	0	0	0
▼51 - Wholesale Trade - Nondurable Goods	1	2,500	50	50	0	0	0
5113 - Whol service paper	1	2,500	50	50	0	0	0
▼59 - Miscellaneous Retail	1	100	0	100	0	0	0
5999 - Ret misc merchandise	1	100	0	100	0	0	0
▼60 - Depository Institutions	3	100,000	100	0	0	0	0
6022 - State commercial bank	2	100,000	100	0	0	0	0
6021 - Natnl commercial bank	1	2,500	100	0	0	0	0
▼61 - Nondepository Credit Institutions	2	25,000	100	0	0	0	0
6153 - Short-trm busn credit	2	25,000	100	0	0	0	0
▼73 - Business Services	5	15,000	78	5	0	17	0
7359 - Misc equipment rental	3	15,000	85	15	0	0	0
7361 - Employment agency	1	100	100	0	0	0	0
7374 - Data processing svcs	1	50	50	0	0	50	0
▼93 - Public Finance Taxation and Monetary Policy	5	5,000	100	0	0	0	0
9311 - Public finance	5	5,000	100	0	0	0	0
▼99 - Nonclassifiable Establishments	1	45,000	100	0	0	0	0
9999 - Nonclassified	1	45,000	100	0	0	0	0

TRADE LINES						
Date of Experience ▼	Payment Status	Selling Terms	High Credit (US\$)	Now Owes (US\$)	Past Due (US\$)	Months Since Last Sale

Date of Experience ▾	Payment Status	Selling Terms	High Credit (US\$)	Now Owes (US\$)	Past Due (US\$)	Months Since Last Sale
09/22	Pays Prompt to Slow 60+	-	1,000	0	0	Between 4 and 5 Months
08/22	Pays Promptly	-	100,000	0	0	Between 2 and 3 Months
08/22	Pays Promptly	-	85,000	0	0	Between 2 and 3 Months
08/22	Pays Promptly	-	45,000	20,000	0	1
08/22	Pays Promptly	-	25,000	25,000	0	1
08/22	Pays Promptly	N30	20,000	50	0	1
08/22	Pays Promptly	N30	15,000	15,000	0	1
08/22	Pays Promptly	-	15,000	2,500	0	1
08/22	Pays Promptly	-	10,000	10,000	0	1
08/22	Pays Promptly	-	2,500	1,000	0	1
08/22	Pays Promptly	-	1,000	0	0	1
08/22	Pays Promptly	N30	100	0	0	Between 4 and 5 Months
08/22	Pays Promptly	-	100	0	0	1
08/22	Pays Prompt to Slow 15+	-	2,500	2,500	0	1
08/22	Pays Prompt to Slow 30+	-	500	0	0	1
08/22	Pays Prompt to Slow 90+	-	50	0	0	Between 6 and 12 Months
08/22	Pays Slow 30-60+	-	40,000	5,000	5,000	Between 2 and 3 Months
07/22	Pays Promptly	N30	30,000	15,000	0	1
07/22	Pays Promptly	-	5,000	0	0	1
07/22	Pays Promptly	-	5,000	0	0	1
07/22	Pays Promptly	-	1,000	0	0	1
06/22	Pays Promptly	-	500	0	0	Between 2 and 3 Months
06/22	Pays Promptly	-	100	0	0	1
04/22	-	Cash account	500	0	0	1
04/22	-	Cash account	500	0	0	1
04/22	-	Cash account	100	0	0	Between 2 and 3 Months
03/22	-	Cash account	250	0	0	1
03/22	-	Cash account	50	0	0	1
03/22	-	Cash account	50	0	0	1
03/22	-	Cash account	50	0	0	1
02/22	-	Cash account	250	0	0	1
02/22	-	Cash account	250	0	0	1
01/22	Pays Promptly	-	1,000	0	0	1
01/22	Pays Promptly	-	500	0	0	1
12/21	-	Cash account	50	0	0	Between 6 and 12 Months
08/21	Pays Promptly	-	500	500	0	1
06/21	Pays Promptly	-	35,000	0	0	1
06/21	Pays Prompt to Slow 60+	-	15,000	0	0	Between 4 and 5 Months
06/21	-	Cash account	250	0	0	1
04/21	Pays Promptly	-	10,000	0	0	Between 6 and 12 Months
02/21	Pays Promptly	-	250	0	0	1
02/21	Pays Slow 90+	-	20,000	20,000	20,000	-
01/21	Pays Slow 30-90+	-	15,000	1,000	1,000	-
11/20	Pays Slow 30+	N30	2,500	0	0	Between 6 and 12 Months
10/20	Pays Slow 30+	-	100	0	0	Between 6 and 12 Months

OTHER PAYMENT CATEGORIES

Other Payment Categories	Experience	Total Amount
Cash experiences	11	US\$ 2,300
Payment record unknown	0	US\$ 0
Unfavorable comments	0	US\$ 0
Placed for collections	0	US\$ 0
Total in D&B's file	45	US\$ 506,500

Accounts are sometimes placed for collection even though the existence or amount of the debt is disputed. Payment experiences reflect how bills are met in relation to the terms granted. In some instances payment beyond terms can be the result of disputes over merchandise, skipped invoices etc. Each experience shown represents a separate account reported by a supplier. Updated trade experiences replace those previously reported.

Corporate Linkage

Increase your understanding of the links and risks between your customers and suppliers with D&B's Interactive Global Family Tree

DOMESTIC ULTIMATE

Company	City , State	D-U-N-S® NUMBER
ERICKSON-HALL CONSTRUCTION CO.	ESCONDIDO , California	02-980-6572

BRANCHES (DOMESTIC)

Company	City , State	D-U-N-S® NUMBER
ERICKSON-HALL CONSTRUCTION CO.	IMPERIAL , California	93-934-6263
ERICKSON-HALL CONSTRUCTION CO.	SANTA ANA , California	02-375-2028

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Legal Events

The following Public Filing data is for information purposes only and is not the official record. Certified copies can only be obtained from the official source.

Bankruptcies	Judgements	Liens	Suits	UCCs
No	0 Latest Filing: -	0 Latest Filing: -	0 Latest Filing: -	3 Latest Filing: 12/15/2020

EVENTS

UCC Filing - Continuation

Filing Date	12/15/2020
Filing Number	200037252935
Received Date	12/21/2020
Original Filing Date	05/10/2016
Original Filing Number	167524365362
Secured Party	REGENTS BANK, A DIVISION OF GRANDPOINT BANK, ESCONDIDO, CA
Debtors	ERICKSON-HALL CONSTRUCTION CO.
Filing Office	SECRETARY OF STATE/UCC DIVISION, SACRAMENTO, CA
UCC Filing - Original	
Filing Date	08/13/2019
Filing Number	197727896581
Received Date	08/14/2019
Secured Party	ENDEAVOR BANK, SAN DIEGO, CA
Debtors	ERICKSON-HALL CONSTRUCTION CO.
Filing Office	SECRETARY OF STATE/UCC DIVISION, SACRAMENTO, CA
UCC Filing - Original	
Filing Date	05/10/2016
Filing Number	167524365362
Received Date	06/24/2016
Collateral	All Negotiable instruments including proceeds and products - All Inventory including proceeds and products - All Account(s) including proceeds and products - All Computer equipment including proceeds and products - and OTHERS
Secured Party	REGENTS BANK, A DIVISION OF GRANDPOINT BANK, ESCONDIDO, CA
Debtors	ERICKSON-HALL CONSTRUCTION CO.
Filing Office	SECRETARY OF STATE/UCC DIVISION, SACRAMENTO, CA

The public record items contained in this report may have been paid, terminated, vacated or released prior to the date this report was printed. This information may not be reproduced in whole or in part by any means of reproduction.

There may be additional UCC Filings in D&Bs file on this company available by contacting 1-800-234-3867.

Special Events

SPECIAL EVENTS	
Date	Event Description
12/12/2020	ERICKSON-HALL CONSTRUCTION CO. was reported by the SBA as a recipient of a loan for \$2,873,507 from Endeavor Bank on 04/05/2020 under the Paycheck Protection Program as authorized under the CARES Act of 2020.

Financials - D&B

A detailed financial statement is not available from this company for publication.

A detailed financial statement is not available from this company for publication.

Financial Ratios

Source: D&B | Currency: All figures shown in USD unless otherwise stated

KEY BUSINESS RATIOS

Statement date 12/31/1999	Based on Number of Establishments 19		
	Ratio for the business	Industry Median	Industry Quartile
Profitability			
Return On Assets	3.2	5.8	3
Return on Net Worth	84.0	35.5	1
Return on Sales	0.9	1.9	3
Short Term Solvency			
Current Liabilities to Inventory	-	999.9	-
Current Liabilities Over Net Worth	999.9	531.9	1
Current Ratio	1.2	1.2	1
Quick Ratio (excl. Short Term Investments)	1.2	1.0	1
Efficiency			
Accounts Payable to Sales	17.3	15.9	1
Assets Over Sale	28.0	28.9	1
Collection Period	73.8	64.2	1
Sales to Inventory	-	999.9	-
Sales Over Net Working Capital	24.6	27.5	3
Utilization			
Total Liabilities Over Net Worth	999.9	549.4	1

D&B currently has no financial information on file for this company.

D&B currently has no financial information on file for this company

D&B currently has no financial information on file for this company

Company Profile

COMPANY OVERVIEW

D-U-N-S 02-980-6572	Mailing Address UNITED STATES	Employees 88
Legal Form Corporation (US)	Telephone +1 760 796 7700	Age (Year Started) 24 Years (1998)
History Record Clear	Website www.ericksonhall.com	Named Principal Dave Erickson , CEO
Date Incorporated 05/01/1998	Present Control Succeeded 1998	Line of Business Nonresidential construction
Business Commenced On	SIC	

1998 15420101

State of Incorporation **NAICS**

CALIFORNIA 236220

Ownership

Not publicly traded



BUSINESS REGISTRATION

Corporate and business registrations reported by the secretary of state or other official source as of: 2022-03-26
This data is for informational purposes only, certification can only be obtained through the Office of the Secretary of State.

Registered Name	ERICKSON-HALL CONSTRUCTION CO.
Corporation Type	Corporation (US)
State of Incorporation	CALIFORNIA
Date Incorporated	05/01/1998
Registration ID	C2038936
Registration Status	ACTIVE
Filing Date	05/01/1998
Where Filed	BUSINESS PROGRAMS DIVISION

Registered Agent

Name	MICHAEL F HALL
Address	500 CORPORATE DRIVE, ESCONDIDO, CA, 920290000

Registered Principal

Name	DAVE ERICKSON
Title	Chief Executive Officer
Address	500 CORPORATE DRIVE, ESCONDIDO, CA, 920290000

PRINCIPALS

Officers

DAVE ERICKSON, CEO
MIKE HALL, COO
MIKE CONROY, CFO

Directors

DIRECTOR(S): THE OFFICER(S)

COMPANY EVENTS

The following information was reported on: 07/17/2020

The California Secretary of State's business registrations file showed that Erickson-Hall Construction Co was registered as a Corporation on May 1, 1998.

Business started 1998. 100% of capital stock is owned by officers.

DAVE ERICKSON. Dave Erickson received his Bachelor of Science degree in Communications and Business from San Diego State University.

MIKE HALL. Michael Hall is a graduate of Texas A&M University and received a Bachelor of Science degree in Civil Engineering and Construction Management.

MIKE CONROY. Antecedents not available.

BUSINESS ACTIVITIES AND EMPLOYEES

The following information was reported on: 07/17/2020

Business Information

Description	Contractor of nonresidential buildings, specializing in new construction of commercial or office buildings (100%). All sales cash. Has 20 account(s). Terms are contractual basis. Sells to non profit organizations, commercial concerns and government. Territory : Local.
Employees	88 which includes officer(s). Undetermined employed here.
Financing Status	Unsecured
Seasonality	Nonseasonal.
Tenure	Owns
Facilities	Owns premises in a two story concrete block building.
Location	Industrial section on main street.

Related Concerns

SIC/NAICS Information

Industry Code	Description	Percentage of Business
1542	Nonresidential construction	-
15420101	Commercial and office building, new construction	-
NAICS Codes	NAICS Description	
236220	Commercial and Institutional Building Construction	

GOVERNMENT ACTIVITY

Activity Summary

Borrower(Dir/Guar)	No
Administrative Debt	No
Contractor	No
Grantee	No
Party excluded from federal program(s)	No

Associations

All Credit Files Created from this D&B Live Report

All Credit Files with Same D-U-N-S® Number as this D&B Live Report

ALL CREDIT FILES CREATED FROM THIS D&B LIVE REPORT

Company Name	Type	Status	Date Created
No data found			

ALL CREDIT FILES WITH SAME D-U-N-S® NUMBER AS THIS D&B LIVE REPORT

Company Name	Type	Status	Date Created
Erickson-Hall Construction Co.	Snapshot D-U-N-S Number 02-980-6572	Saved	11/12/2014

Your Information

Record additional information about this company to supplement the D&B information.

Note: Information entered in this section will not be added to D&B's central repository and will be kept private under your user ID. Only you will be able to view the information.

In Folders: [View](#)

Account Number**Endorsement/Billing Reference *****Sales Representatives**

rwarnock@alliant.com

Credit Limit**Total Outstanding**

0

0

Last Login : 10/07/2022 02:56:02 PM

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PACIFIC PREMIER
BANK

December 10, 2021

VIA ELECTRONIC COMMUNICATION

David Jeffrey
CFO, Erickson Hall Construction
500 Corporate Drive, Escondido, CA 92029
Escondido, CA 92029

RE: Line of Credit Reference

Per your request, Pacific Premier Bank is pleased to provide this letter to you as a confidential bank reference which may be shared with your vendors.

Since Sep, 2012, Pacific Premier Bank has provided Erickson Hall Construction with a line of credit, which is currently sized in the low 7 figure range. At this time, the line remains unused and fully available. The line is reviewed and renewal annually in June. The company is in full compliance of all covenants and conditions.

Sincerely,

Geoffrey Bogart

Geoff Bogart
1st Vice President/Senior Relationship Manager
Pacific Premier Bank

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4330 La Jolla Village Drive | Suite 100 | San Diego, CA 92122 | PPBI.com | NASDAQ: ppbi



EXPERIENCE & TECHNICAL COMPETENCE



Erickson-Hall **Construction**

500 Corporate Drive
Escondido, CA 92029
RFP/P Contact: Penny Lawlor
760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

■ ■ build on our reputation





EXPERIENCE & TECHNICAL COMPETENCE

Erickson-Hall has been successful throughout our 24-year history assisting districts and design teams resolve budget and schedule challenges without impacting the architect's aesthetic intent or functionality of building systems. Our lease-leaseback teams have worked diligently to ensure decisions made during preconstruction are accurately implemented in the field. We offer a full menu of preconstruction services, including budgeting, scheduling, constructability reviews, building information modeling (BIM), value engineering analyses, construction planning, etc. for California K-12 modernization and new construction projects. An opportunity to serve our clients comes with every project. Experience has demonstrated that we have the greatest impact on a project when we collaborate with a school district and their design team(s) during a project's early stages. Overall project success, whether optimizing value, controlling costs or meeting aggressive schedules, relies not only on our professional capabilities, but also on our collaborative approach to specific project challenges.

California K-12 school facility new construction and modernization has been Erickson-Hall's primary market focus since our 1998 inception. We have a clear understanding of DSA requirements and have established solid working relationships with DSA inspectors throughout Southern California. Our collaborative interaction ensures projects remain on track and within established budget parameters. Essential to our success has been our ability to plan, manage and/or execute complex construction on occupied campuses, as well as our focus on streamlining the DSA close-out process in the final stages of construction.

24 YEARS K-12 EXPERIENCE

- 51** SCHOOL DISTRICT CLIENTS
- 67** ELEMENTARY SCHOOL PROJECTS
- 30** MIDDLE SCHOOL PROJECTS
- 300** HIGH SCHOOL PROJECTS
- 250+** LEASE-LEASEBACK PROJECTS



DANCE STUDIO - CREATIVE ARTS ADDITION
ORANGE GLEN HIGH SCHOOL



OWNER

Carlsbad Unified School
District
Eric Dill
Assistant Superintendent
760.331.5036

COMPLETION

May 2018

CONTRACT VALUE

\$15,574,800

SAGE CREEK HIGH SCHOOL PERFORMING ARTS CENTER

3900 Cannon Road . Carlsbad . CA . 92010

Erickson-Hall provided comprehensive preconstruction and construction phase services for the lease-leaseback delivery of a new 17,272 SF Performing Arts Center on the existing Sage Creek High School campus. The new center features a spacious 2-story lobby, a 345-seat auditorium and wood floor stage. The back-of-house Black Box/ Multi-Purpose Room is separated from the auditorium by a double wall and corridor to reduce noise and opens onto an outside courtyard providing the flexibility for indoor/ outdoor use. Construction activities were executed on the active high school campus without disruption to the learning environment while ensuring the constant safety of students, faculty, staff and campus visitors.





EXPERIENCE & TECHNICAL COMPETENCE

Estancia High School
Theater Project

OCEANSIDE HIGH SCHOOL PERFORMING ARTS CENTER

1 Pirates Cove Way . Oceanside . CA . 92054

COMPLETION

October 2017

CONSTRUCTION VALUE

\$18,882,069.00

Construction of a new 29,067 SF Performing Arts Center located on a 2.47 acre site on the Oceanside High School campus. The new facility featured a 502-seat main theater and a 120-seat "black-box" style theater, an orchestra pit, recording studio, control room, costume storage room, changing room and two classrooms. Site work encompassed a new fire lane, fencing, outdoor work yard, landscaping, vehicular and service access road and parking. Construction activities were being coordinated and executed on an active high school campus without disruption to the learning environment while ensuring the constant safety of students, faculty, staff and campus visitors.





EXPERIENCE & TECHNICAL COMPETENCE

Estancia High School
Theater Project

LEASE-LEASEBACK EXPERIENCE - PAST 5 YEARS - A PARTIAL LIST									
DELIVERY / ERICKSON-HALL'S ROLE	PROJECT NAME	OWNER / REFERENCES RELATIONSHIP WITH CLIENT	CONSULTANTS	ERICKSON-HALL PROJECT TEAM	CONTRACT AWARD & COMPLETION DATES	PROJECT TOTAL VALUE	AMOUNT OF FEES RECEIVED	PROJECT DESCRIPTION	KEY SUBCONTRACTORS
Lease-Leaseback Role: General Contractor	Pacific Sky School	Del Mar Union School District Christopher Delehanty, Director of Facilities & Technology 858.755.9301 cdelehanty@dmusd.org Relationship: Excellent	obrArchitecture Garick Oliver, Principal 619.564.7586	Project Executive, Jim Fisher; Superintendent, Gary Minch, Jesses Grossman & Steve Fleming; Project Manager, Danny Weigel; Project Engineer, John Hall, Chris Lawlor & Brandon Fisher	Contract Award: November - 2019 Completion: August 2022	\$53,611,129	Preconstruction Fee: \$165,648 LLB Fee: \$1,627,835 GC's: \$2,129,664	Construction of a new, 2-building elementary school campus for students in grades kindergarten through 6. The main building will be approximately 57,000 SF and will house 19 classrooms, administration, 4 special education classrooms, offices for Speech, And 3 STEAM classrooms.	Earthwork, Sierra Pacific West; Storm Drainage, Southwest V-Ditch; Structural Steel, Maya Steel Fabrications; Roofing, Sylvester Roofing Co., Inc.; Metal Framing, American Sheet Metal; Elevators, NA; Plumbing, Ranbar Plumbing; HVAC, Able Heating & Air Conditioning; Electrical, ACE Electric; Concrete, Bravo Concrete
Lease-Leaseback Role: General Contractor	Los Alamitos High School STEM Building	Los Alamitos Unified School District CJ Knowland, Director of Facilities 562.799.4592 ext. 81116 CKnowland@losal.org Relationship: Excellent	Westgroup Designs, Inc. Michael Ceconi, Senior Project Manager 949.250.0880	Project Executive, Justin Sinnott; Superintendent, Darrell Tracy; Asst. Superintendent, Ryan Lundy; Project Manager, Edgar Mendoza; Project Engineer, Matthew Loney	Contract Award: May - 2019 Completion: August 2022	\$51,660,769	Preconstruction Fee: \$69,700 LLB Fee: \$1,654,298 GC's: \$1,805,580	Construction of a new 3-story, 86,00 SF Science, Technology, Engineering, & Mathematics Building at the high school. The new building will house a large computer lab, 8 science labs, 2 chemistry labs, 17 classrooms and school administration. Construction activities were executed on the active high school campus.	Earthwork, Post Earthworks; Storm Drainage, BMP Solutions; Structural Steel, Columbia Steel; Roofing, Stone Roofing Company; Metal Framing, Maranatha Sheet Metal; Elevators, ThyssenKrupp; Plumbing, Pro-Craft Construction; HVAC, Coutts Heating & Cooling; Electrical, RDM Electric; Concrete, KAR Construction, Inc.
Lease-Leaseback Role: General Contractor	Griffiths Middle School Modernization	Downey Unified School District Vince Madsen, Senior Director, Facilities Planning & Development 562.469.6707 vmadsen@dusd.net Relationship: Excellent	LPA Design Studios Orange County Jim Kisel, Principal 949.261.1001	Project Executive, Justin Sinnott; Superintendent, Nat Riddle; Asst. Superintendent, Aaron Blackwell; Project Manager, Mike Arnold; Project Engineer, Isabel Cortes	Contract Award: June - 2019 Completion: November - 2021	\$40,543,701	Preconstruction Fee: \$101,526 LLB Fee: \$597,991 GC's: 1,898,482	Construction of a new 13,950 SF gymnasium with a performance platform and support spaces, a new 19,420 SF, 2-story building housing 12 classrooms, offices, restrooms and support spaces. Construction activities were executed on the active middle school campus.	Earthwork, Post Earthworks Construction, Inc.; Storm Drainage, Pro-Craft Construction, Inc.; Structural Steel, SCW Contracting Corporation; Roofing, San Marino Roof Co, Inc.; Metal Framing, Crown Steel, Inc.; Elevators, Mitsubishi Electric US, Inc.; Plumbing, Pro-Craft Construction, Inc.;
Lease-Leaseback Role: General Contractor	Agua Caliente Elementary School	Palm Springs Unified School District Julie Arthur, Exec. Director, Facility Planning 760.416.6113 jarthur@psusd.us Relationship: Excellent	Baker Nowicki Design Studio Brian Leonard, Principal 619.795.2450 bleonard@bndesignstudio.com	Project Executive, Steve Rogers; Construction Manager, Rick Osgood; Superintendent, Mike Thompson; Asst. Superintendent, Jeff Toboco; Project Manager, Ryan Bouchard; Project Engineer, Joe Bunker	Contract Award: May - 20217 Completion: June - 2019	\$39,234,429	Preconstruction Fee: None LLB Fee: \$1,815,627 GC's: \$1,681,300	Construction of a new, 5-building elementary school campus on a 4.5 acre site. Scope includes demolition of existing campus after completion of new facilities.	Earthwork, Ortiz Tractor Service; Storm Drainage, Pro-Craft Construction; Structural Steel, Columbia Steel; Roofing, Courtney, Inc.; Metal Framing, Challenger Sheet Metal; Elevators, ThyssenKrupp; Plumbing, Pro-Craft Construction; HVAC, Desert Air Conditioning & Heating; Electrical, BEC Electrical; Concrete, KAR Construction
Lease-Leaseback Role: General Contractor	Doty Middle School Modernization	Downey Unified School District Vince Madsen, Senior Director, Facilities Planning & Development 562.469.6707 vmadsen@dusd.net Relationship: Excellent	Rachlin Partners John Thomas, Project Mgr 310.204.3400 jthomas@rachlinpartners.com	Project Executive, Justin Sinnott; Superintendent, Peter Lamirand & Earnest Fields; Project Engineer, Vipin Shaji	Contract Award: May - 2020 Completion: December - 2021	\$34,048,600	Preconstruction Fee: \$47,943 LLB Fee: \$1,526,125 GC's: \$1,750,000	Construction of a 28,000 SF, 2-story classroom building, a 14,000 SF gymnasium with retractable bleachers and a performance platform, as well as a campus-wide modernization of existing structures.	Earthwork, Post Earthworks; Storm Drainage, Pro-Craft Construction; Structural Steel, SCW Contracting; Roofing, San Marino Roof; Metal Framing, Church & Larsen; Elevators, Mitsubishi Electric; Plumbing, Pro-Craft Construction; HVAC, Franklin Mechanical; Electrical, Rancho Pacific Electric; Concrete, KAR Construction
Lease-Leaseback Role: General Contractor	Solana Vista School Reconstruction	Solana Beach School District Patrick Mason, Director, Maintenance, Operations & Facilities 858.794.7150 patrickmason@sbsd.net Relationship: Excellent	Alpha Studio Group Josh Eckle, Architect 760.431.2444 josh@alphastudio-design.com	Project Executive, Jim Fisher; Superintendent, Tim Smith & Chad Menard; Project Engineer, Zach Bing, John Hall & Chris Lawlor	Contract Award: May - 2019 Completion: October 2021	\$31,631,494	Preconstruction Fee: \$77,190 LLB Fee: \$990,678 GC's: \$2,225,640	Demolition of existing elementary school campus and construction of new 65,000 SF elementary school to include an Administration / Media Center / Classroom Building and a Multi-Purpose / Food Service building.	Earthwork, Post Earthworks; Storm Drainage, Interpipe Contracting; Structural Steel, Pacific Coast Iron; Roofing, Sylvester Roofing; Metal Framing, Western Bay Sheet Metal; Elevators, NA; Plumbing, Interpipe Contracting; HVAC, ACH Mechanical Contractors; Electrical, Baker Electric; Concrete, Bravo Concrete

Erickson-hall has no discussion of claims, demands, and/or litigations arising from this project list.



EXPERIENCE & TECHNICAL COMPETENCE

Estancia High School
Theater Project

DELIVERY / ERICKSON-HALL'S ROLE	PROJECT NAME	OWNER / REFERENCES RELATIONSHIP WITH CLIENT	CONSULTANTS	ERICKSON-HALL PROJECT TEAM	CONTRACT AWARD & COMPLETION DATES	PROJECT TOTAL VALUE	AMOUNT OF FEES RECEIVED	PROJECT DESCRIPTION	KEY SUBCONTRACTORS
Lease-Leaseback Role: General Contractor	Jordan High School Classroom Building	Long Beach Unified School District Vince Marchetti, Maintenance Director 562.997.8000 vmarchetti@lbuschools.net Relationship: Excellent	PJHM Architects Charlene Yarnell, Principal 760.730.5527 char@pjhm.com	Project Executive, Justin Sinnott; Superintendent, Tim Tully; Project Engineer, Perry Ko	Contract Award: May - 2021 Completion: May - 2023	\$29,800,000	Preconstruction Fee: \$0 LLB Fee: \$1,882,307 GC's: \$1,123,358	Demolition of 3 existing buildings and construction of a new 2 story, 31,559 SF, steel framed classroom building.	Earthwork, Post Bros Construction Co.; Storm Drainage, Pro-Craft Construction; Structural Steel, AAF Steel Structural; Roofing, San Marino Roof Co.; Metal Framing, AAF Structural Steel; Elevators, ThyssenKrupp; Plumbing, Verne's Plumbing, Inc.; HVAC, Air Design Solutions; Electrical, Electric Service & Supply Co. of Pasadena; Concrete, KAR Construction
Lease-Leaseback Role: General Contractor	Little Lake Elementary School Modernization	Hemet Unified School District Mike Sattley, Facilities Director 951.765.5100 msattley@hemetUSD.k12.ca.us Relationship: Excellent	HMC Architects Steven Prince Managing Principal 619.744.4077 steven.prince@hmcarchitects.com	Project Executive, Bill Grundman; Construction Manager, Joe Kresl; Superintendent, Gerhard Bockness & Andy Teclaw; Asst. Superintendent, David Vasquez; Project Manager, Greg Bragg; Project Engineer, Vince Dominguez	Contract Award: September - 2021 Completion: Aug 2022	\$26,750,800	Preconstruction Fee: \$67,280 LLB Fee: \$1,122,455 GC's: \$1,335,837	Construction of 2 new kindergarten buildings (2,805 SF each), one new 8,085 SF classroom building, relocation of 12 modular buildings, and major site renovation/re-configuration work.	Earthwork, Howard Contracting, Inc.; Storm Drainage, Howard Contracting, Inc.; Structural Steel, Columbia Steel; Roofing, Bell Roof Co.; Metal Framing, Challenger Sheet Metal; Elevators, NA; Plumbing, Interpipe Contracting, Inc.; HVAC, Franklin Mechanical Systems, Inc.; Electrical, Champion Electric; Concrete, Bravo Concrete
Lease-Leaseback Role: General Contractor	Rancho Verde High School	Val Verde Unified School District Stacy Strawderman Director, Facilities & Purchasing 951.940.6136 sstrawderman@valverde.edu Relationship: Excellent	PBK Architects Gilbert Baez, Principal 909.937.9200	Project Executive, Bill Grundman; Construction Manager, Joe Kresl; Superintendent, Dennis Fuller; Asst. Superintendent, Paul Murillo; Project Manager, Leon Cavallo; Project Engineer, Lisa Chavez	Contract Award: January - 2019 Completion: December - 2020	\$26,300,000	Preconstruction Fee: \$35,000 LLB Fee: \$1,134,177 GC's: \$881,090	Scope of work entails various site improvements, ADA site improvements, new parking lot, new restroom building, add bleachers, new scoreboards, new dugouts, new fire alarm, intrusion systems, and various interior improvements.	Earthwork, Pennsylvania Coatings; Storm Drainage, Pennsylvania Coatings; Structural Steel, Republic Iron Works; Roofing, Letnar Roofing; Metal Framing, United Contractors; Elevators, NA; Plumbing, Pro-Craft Construction; HVAC, Mesa Energy; Electrical, FEC Electric; Concrete, KAR Construction
Lease-Leaseback Role: General Contractor	Jefferson Elementary School	Corona-Norco Unified School District Sam Morrison, Construction Project Manager 951.736.5000 smorrison@cnusd.k12.ca.us Relationship: Excellent	PCH Architects Rick Arias, Partner, Principal 909.792.7397	Project Executive, Bill Grundman; Construction Manager, Joanna Heinrich; Superintendent, Travis Ahrend; Project Manager, Trish Horton; Project Engineer, Sophia Siemens	Contract Award: April - 2019 Completion: August - 2021	\$20,959,459	Preconstruction Fee: \$64,065 LLB Fee: \$1,966,768 GC's: \$973,806	The Scope of Work includes the replacement of relocatable classroom buildings with permanent facilities and renovation of the 2 existing academic buildings.	Earthwork, Pratt Equipment Corp.; Storm Drainage, Pro-Craft Construction; Structural Steel, Steel Tech Fabrications; Roofing, NAME; Metal Framing, Challenger Sheet Metal; Elevators, NA; Plumbing, Pro-Craft Construction; HVAC, W.R. Robbins Co.; Electrical, FEC Electric; Concrete, Haxton Masonry
Lease-Leaseback Role: General Contractor	John Adams Elementary School Modernization	Corona-Norco Unified School District Sam Morrison, Construction Project Manager 951.736.5000 smorrison@cnusd.k12.ca.us Relationship: Excellent	Ruhnau Clarke Roger Clarke, Principal 951.684.4664 rclarke@rcarch.com	Project Executive, Bill Grundman; Superintendent, Jeff Coon ; Project Manager, Joanna Heinrich; Asst. Project Manager, Trish Horton; Project Engineer, Jon Perez	Contract Award: March - 2016 Completion: June - 2018	\$15,322,381	Preconstruction Fee: \$95,000 LLB Fee: \$1,248,060 GC's: \$642,384	Construction of a new multi-purpose building, kindergarten classroom wing, library, & remodel of existing administration building. Construction activities were executed on the active elementary school campus.	Earthwork, Elite Earthwork; Storm Drainage, Interpipe Contracting; Structural Steel, KBC Towers; Roofing, Best Contracting; Metal Framing, NA; Elevators, NA; Plumbing, Interpipe Contracting; HVAC, Arrowhead Mechanical; Electrical, Circle City Electric; Concrete, KAR Construction
Lease-Leaseback Role: General Contractor	Lincoln Alternative Elementary School	Corona-Norco Unified School District Sam Morrison, Construction Project Manager 951.736.5000 smorrison@cnusd.k12.ca.us Relationship: Excellent	Ruhnau Clarke Roger Clarke, Principal 951.684.4664 rclarke@rcarch.com	Project Executive, Bill Grundman; Superintendent, Travis Ahrend; Project Manager, Joanna Heinrich; Project Engineer, Jon Perez	Contract Award: March - 2016 Completion: June - 2018	\$15,136,294	Preconstruction Fee: \$95,000 LLB Fee: \$1,105,451 GC's: \$568,982	Campus modernization encompassing new academic facilities, administrative & support services, classrooms, offices, library, media center, and a multi-purpose building. Construction activities were executed on the active elementary school campus.	Earthwork, Pratt Equipment Corp.; Storm Drainage, Interpipe Contracting; Structural Steel, KBC Towers; Roofing, Best Contracting; Plumbing, Interpipe Contracting; HVAC, Arrowhead Mechanical; Electrical, Circle City Electric; Concrete, KAR Construction

Erickson-hall has no discussion of claims, demands, and/or litigations arising from this project list.

ABILITY TO RESPOND TO DISTRICT NEEDS



Erickson-Hall **Construction**

500 Corporate Drive
Escondido, CA 92029
RFP/P Contact: Penny Lawlor
760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

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ABILITY TO RESPOND TO DISTRICT NEEDS

Estancia High School
Theater Project

ABILITY TO RESPOND TO DISTRICT NEEDS

Erickson-Hall's lease-leaseback team responsible for the successfully delivery of the Estancia Theater Project will be based out of our Orange County Office, located less than 30 minutes from Estancia High School. Our Project Superintendent will be located onsite 100% of the time for the full course of construction. All of our team members are equipped with cell phones and IPADs and will have the ability to respond to the District in less than an hour.



LOS ALAMITOS HIGH SCHOOL
STEM CLASSROOM BUILDING

CONTRACTING HISTORY



Erickson-Hall **Construction**

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760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

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CONTRACTING HISTORY

Erickson-Hall has not 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.
- Withdrawal of a proposal or bid as a result of an error Termination or failure to complete a contract.
- Debarment by any municipal, county, state, federal, or local agency.
- Involvement in litigation, arbitration, or mediation in the last five (5) years.
- 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.
- Knowing concealment of any deficiency in the performance of a prior contract.
- Falsification of information or submission of deceptive, or
- Willful disregard for applicable rules, laws, or regulations.



OXFORD ACADEMY

ADDITIONAL INFORMATION

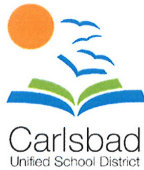


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Escondido, CA 92029
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760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

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6225 El Camino Real • Carlsbad, CA 92009
760-331-5000 p • 760-431-6707 f

May 1, 2018

Mr. David Erickson, Chief Executive Officer
Erickson-Hall Construction Co.
Escondido, CA 92029

It is with great pleasure that I write this letter of recommendation for Erickson-Hall Construction Co. due to your team's exemplary performance on the Valley Middle School PE Locker Rooms & Science Lab and the Performing Arts Center at Sage Creek High School projects.

Upon bringing your team on board for the lease-leaseback delivery of the District's projects, it was determined that the Performing Arts Center project had a significant budget shortfall due to escalation, tariff increase and a few other design issues. Your team went to work and developed two options which both included approximately \$470,000 in acceptable value engineering suggestions and allowed the project to move forward. Early on in the construction phase, a significant challenge faced by Erickson-Hall when it was determined that the soil was unsuitable. This unforeseen condition along with poor weather conditions resulted in a 30-day schedule increase for a soil import/export operation and claimed a significant amount of the contingency money. Due to the careful planning and outstanding project management of Erickson-Hall's team, minimal contingency funds were needed to cover other unanticipated items resulting in the ability to add the previously "value engineered out" components back into the build. Despite the impact to the schedule, Erickson-Hall completed the Performing Arts Center a month earlier than the contract end date. The Valley Middle School PE Locker Rooms & Science Lab project was also completed on time and met our expectations.

It must also be noted that simultaneously with the construction of the Performing Arts Center, Erickson-Hall stepped in to assist the District with a failing project under construction by another general contractor on the Sage Creek High School campus. Erickson-Hall was able to come to the aid of the District by fixing and completing the project within its extremely tight schedule.

Finally, working on an occupied high school campus presents a variety of challenges. The safety of students and staff was never compromised, and your concern for maintaining the integrity of the learning environment did not go unnoticed. Erickson-Hall has clearly demonstrated that District's interests stay at the forefront of the decision making process. We appreciate your commitment to teaming with architects, engineers, subcontractors, as well as District staff and site personnel to identify and resolve issues in a proactive, positive team environment. Erickson-Hall exceeded our expectations and made a lasting impression. I can recommend Erickson-Hall Construction Co. without reservation and look forward to future opportunities to work with them again.

Sincerely,

KELLY FLEMING, MPA
Director of Facilities & Construction Management

Cc: William Morrison- Gafcon
File



Downey Unified School District

Gallegos Administration Center
11627 Brookshire Avenue, P.O. Box 7017, Downey, California 90241-7017
(562) 469-6500, FAX: (562) 469-6515

Board of Education

President
D. Mark Morris

Vice President
Barbara R. Samperi

Clerk
Martha E. Sodehani

Members
Giovanna Perez-Saab
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Linda Salomon Saldaña
Nancy A. Swenson

Superintendent
John A. Garcia, Jr., Ph.D.

August 25, 2021

Erickson-Hall Construction Co.
500 Corporate Drive
Escondido, CA 92029

RE: Letter of Recommendation

To Whom It May Concern:

It is with significant pleasure I write this letter of recommendation for Erickson-Hall Construction Co. In 2019 Downey Unified School District contracted with Erickson-Hall for the lease-leaseback delivery of the modernization of Griffiths Middle School, and in 2020 we executed a second contract for the modernization of Doty Middle School. Both projects encompassed new construction of a 2-story classroom building, a new gymnasium building, modernization of existing classrooms, and extensive site work. Construction values for each project exceed \$30 million.

Immediately upon the start of the preconstruction phase of the Griffiths Middle School Project, it was readily apparent that Erickson-Hall was committed to collaborative interaction and effective communication between stakeholders. We appreciate the attention focused on ensuring the District's construction dollars were spent wisely. Their teams' focus on value engineering and constructability ensured we received maximum value for every dollar spent. Erickson-Hall is a proactive company, anticipating rather than reacting to project challenges. Their willingness to team with architects, engineers and District staff to identify and implement the most effective solutions while keeping the best interest of the District at the forefront of the decision-making process was impressive.

Finally, working on an occupied school campus can present a host of challenges, both to student safety and maintaining the integrity of the learning environment. Erickson-Hall recognized that our campuses are schools first and construction sites second. Student safety was never compromised under Erickson-Hall's watch, and we value their willingness to coordinate construction activities around the ongoing activities of campus life.

I can, without reservation, recommend Erickson-Hall.

Sincerely,

Vince Madsen
Senior Director
Facilities, Planning and Development
Downey Unified School District
11627 Brookshire Ave
Downey, CA 90241

vmadsen@dusd.net
(562) 469-6707



BUSINESS DEPARTMENT – Facilities Development & Planning
Office of the Executive Director
2425 Webster Avenue, Long Beach, CA 90810
(562) 997-7550 Fax (562) 595-8644

August 26, 2021

Subject: Letter of Recommendation for Erickson-Hall Construction

To Whom it May Concern:

I am pleased to write this letter of recommendation for Erickson-Hall Construction on behalf of the Long Beach Unified School District. Erickson-Hall and its assigned team members have provided exceptional construction services on several LBUSD school projects over the past decade.

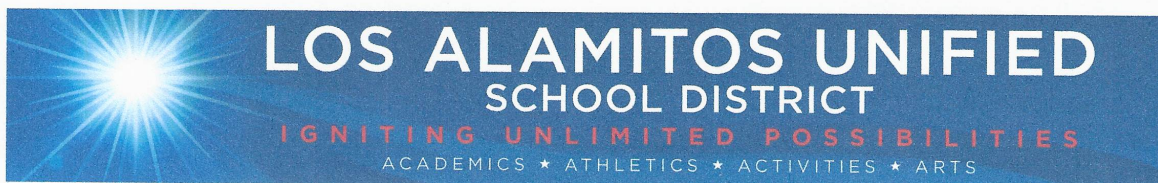
Our Facilities Development & Planning division oversees a \$3 billion building program and has successfully completed several new construction, addition, and renovation projects on account of the firm's professional assistance. Specifically, Erickson-Hall has been instrumental in helping us leverage our local bond dollars by performing top notch pre-construction and construction services. We've assigned Erickson-Hall as the builder on time-sensitive projects and they have delivered on every occasion.

Erickson-Hall's work and approach as well as their responsiveness to the multitude of directives and requests is exemplary. Their ability to balance the many projects we direct their way has allowed classroom construction to continue moving at top speed. Further, their work for us on various types of projects such as classroom modernizations, campus expansions, and athletic facilities demonstrates their broad knowledge base and our continued trust in the firm.

It is without reservation and with great pleasure that I recommend this outstanding firm to other organizations. We expect to continue to have Erickson-Hall Construction play a key role on current and future projects for the Long Beach Unified School District.

Sincerely

David Miranda
Executive Director
Facilities Development & Planning



10293 Bloomfield Street • Los Alamitos, CA 90720-2200
(562) 799-4700 • FAX (562) 799-4730

*Andrew Pulver, Ed.D.
Superintendent*

December 14, 2020

Erickson-Hall Construction Company
500 Corporate Drive
Escondido, CA 92029

To Whom It May Concern:

It is my sincere pleasure to write this letter of recommendation for Erickson-Hall Construction Co. The District contracted with Erickson-Hall for the lease-leaseback delivery of the \$57 million Los Alamitos High School STEM Building.

From the moment of contract award, Erickson-Hall's lease-leaseback team has been a great partner in our Construction Program. They are always ready to assist with budgeting and scheduling to meet District needs. They have helped facilitate design issues by bringing in the necessary trade contractors to work hand-in-hand with our design professionals.

It has become clear to me that Erickson-Hall has mastered the art of executing complex construction on an occupied school campus and recognized that Los Alamitos High was a school first, a construction site second. Their staff always puts the safety of students, staff and campus visitors first. The team has also shown respect for the integrity of the learning environment ensuring that construction activities do not disrupt our students' ability to study and concentrate on testing days. In an effort to minimize the impact to staff parking and student drop-off, Erickson-Hall had the underground utility work performed at night.

Erickson-Hall's use of Building Information Modeling (BIM) proved highly beneficial with the identification of hundreds of conflicts/issues in the construction documents enabling the design team to resolve the conflicts prior to the start of construction. Needless to say, this allowed for an incredibly smooth construction process.

As an added bonus to our District and the Los Alamitos High School campus, Erickson-Hall immediately responded to our request for help when another general contractor working on site was failing. The Erickson-Hall team jumped in to complete brick veneer work and fire alarm repairs before students and staff arrived back to campus at the start of the school year.

Erickson-Hall brought the highest level of professionalism to our project. I look forward to working with them on projects for many years to come.

Sincerely,

Nancy Nien, Ph.D.
Assistant Superintendent of Business Services

Board of Education: David Boyer • Megan Cutuli • Marlys Davidson • Diana D. Hill • Karen Russell



From: John Thomas <jthomas@rachlinpartners.com>
Date: January 5, 2022 at 3:55:00 PM PST
To: Dave Erickson <dave@ericksonhall.com>, Mike Hall
<Mhall@ericksonhall.com>
Cc: Mat Gates <mgates@ericksonhall.com>
Subject: Team Doty

Good Afternoon Messrs. Erickson and Hall,

I have been the project architect on a half dozen projects where your company was the general contractor including the Sage Creek Performing Arts Center, Hope Elementary and Doty Middle School. While I have had excellent experiences with all your employees, the team at Doty, Pete Lamirand, Vipin Shaji and Justin Sinnott, are some of the most professional and competent people I have worked with in my 40 plus years in the business. This was a very complex project with lots of moving parts which they handled with ease and good spirit and made this project go as smooth as it possibly could have. I was able to tell them that today as this project wraps up but I thought you should hear it from me as well. As I'm sure you are aware there are lot of less desirable contractors out there and its truly a pleasure to work with your teams.

Regards,

John Thomas, AIA
Project Manager

RACHLIN
P A R T N E R S

8640 National Boulevard
Culver City, CA 90232
310.204.3400

jthomas@rachlinpartners.com

TECHNICAL COMPETENCE



Erickson-Hall **Construction**

500 Corporate Drive
Escondido, CA 92029
RFP/P Contact: Penny Lawlor
760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

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TECHNICAL COMPETENCE

In-house resources offered by Erickson-Hall include the technical capabilities to manage scheduling, budgeting, cost estimating, document control and field construction activities. Our Construction Management Team utilizes cloud-based Procore project management software to coordinate and administer electronic communication (contracts, submittals, closeout items, RFIs, ASIs, meeting minutes, correspondence, daily reports, etc.) between all project stakeholders. The system provides a collaborative HUB that improves project organization, reduces unnecessary paperwork and creates a permanent electronic database of project documentation. Bluebeam Revu will be utilized to streamline document navigation featuring hyperlinked drawings and bookmarks for electronic drawings and RFI information, as well as As-Built documentation through the entire life cycle of each project. Bluebeam provides improved collaboration between all project stakeholders with cloud based electronic drawing sets accessible by anyone invited to the Bluebeam Studio Project. All project documentation will be maintained electronically allowing immediate access to project team members for distribution, retrieval and/or review. Our FTP website also aids in the transmission of large files, plans and specifications. We continue to invest in current technology to keep our management systems efficient and to provide our clients with best value solutions for their construction needs, including but not limited to:

- Timberline Cost Estimating & Accounting Software
- Digitizers
- Bid Fax
- OCE Plan Scanner & Copier
- FTP Website
- Procore Project Management Software
- Microsoft Project Scheduling Software
- IPAD Digital Technology in the Field
- Building Information Modeling (BIM) Software
 - » REVIT
 - » NavisWorks
 - » Adobe
 - » GoogleDocs
 - » Other Virtual Communication & Efficiencies



OCEANSIDE HIGH SCHOOL PERFORMING ARTS CENTER

INSURANCE



Erickson-Hall **Construction**

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plawlor@ericksonhall.com

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October 7, 2022

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

To whom it may concern,

We have reviewed the insurance requirements as outlined in Newport Mesa Unified School District's Request for Qualifications for Newport Mesa USD Projects. Erickson-Hall currently meets or exceeds the District's insurance requirements and will be able to meet the insurance requirements as outlined in the Newport Mesa Unified School District's Request for Proposal/Qualifications for Lease-Leaseback services for the Estancia High School Theater Project, should they be the District's selected Design-Build Contractor.

Please contact me with any questions and/or concerns at (619) 849-3807.

Sincerely,

A handwritten signature in blue ink, appearing to read "James D. Castle".

James D. Castle
Senior Executive Vice President

Alliant Insurance Services, Inc.
701 B St 6th Fl San Diego, CA 92101
P (760) 304-7120
CA License #0C36861 www.alliant.com



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

9/1/2022

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

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

PRODUCER Alliant Insurance Services, Inc. 701 B Street, 6th floor San Diego CA 92101	CONTACT NAME: Susan Koelle PHONE (A/C, No, Ext): 619-541-4851 FAX (A/C, No): E-MAIL ADDRESS: Susan.Koelle@alliant.com												
INSURED Erickson-Hall Construction Company 500 Corporate Drive Escondido CA 92029-1353	INSURER(S) AFFORDING COVERAGE <table><tr><td>INSURER A: National Union Fire Insurance</td><td>NAIC # 19445</td></tr><tr><td>INSURER B: Continental Insurance Company</td><td>35289</td></tr><tr><td>INSURER C: New Hampshire Insurance Compan</td><td>23841</td></tr><tr><td>INSURER D: Starr Indemnity & Liability Co</td><td>38318</td></tr><tr><td>INSURER E:</td><td></td></tr><tr><td>INSURER F:</td><td></td></tr></table>	INSURER A: National Union Fire Insurance	NAIC # 19445	INSURER B: Continental Insurance Company	35289	INSURER C: New Hampshire Insurance Compan	23841	INSURER D: Starr Indemnity & Liability Co	38318	INSURER E:		INSURER F:	
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INSURER B: Continental Insurance Company	35289												
INSURER C: New Hampshire Insurance Compan	23841												
INSURER D: Starr Indemnity & Liability Co	38318												
INSURER E:													
INSURER F:													

COVERAGES**CERTIFICATE NUMBER:** 1983485850**REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	☒ COMMERCIAL GENERAL LIABILITY ☐ CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: ☐ POLICY ☒ PRO-JECT ☐ LOC ☐ OTHER:			5856940	9/1/2022	9/1/2023	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 300,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ 2,000,000 \$
A	☒ AUTOMOBILE LIABILITY ☒ ANY AUTO ☒ OWNED AUTOS ONLY ☒ SCHEDULED AUTOS ☒ HIRED AUTOS ONLY ☒ NON-OWNED AUTOS ONLY			5717908	9/1/2022	9/1/2023	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ Comp. Deductible \$ 250
D	☒ UMBRELLA LIAB ☒ OCCUR ☒ EXCESS LIAB ☐ CLAIMS-MADE ☐ DED ☐ RETENTION \$			1000587926221	9/1/2022	9/1/2023	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 PRODUCTS COMP. OP AGG \$ 10,000,000
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below Y / N ☐ N / A			014195849	9/1/2022	9/1/2023	☒ PER STATUTE ☐ OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
B	Excess Liability - 2nd Layer Self Insured Retention \$0			FFX6081631144	9/1/2022	9/1/2023	Each Incident \$10,000,000 Aggregate \$10,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

Coverage: Builders Risk-All Risk (Flood and Earthquake excluded)

Carrier: Illinois Union Insurance Company

Policy Number: 121058671 012

Policy Period: 9/1/2022 - 9/1/2023

Limit Per Occurrence: \$40,000,000

Deductible Per Occurrence: \$10,000

Coverage: Contractors Professional and Pollution Liability

See Attached...

CERTIFICATE HOLDER**CANCELLATION**

Evidence of Insurance

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ACORD 25 (2016/03)

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LITIGATION



Erickson-Hall **Construction**

500 Corporate Drive
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RFP/P Contact: Penny Lawlor
760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

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LITIGATION

Erickson-Hall has not been involved in claims filed by or against our firm in the last five (5) years.



DOTY MIDDLE SCHOOL MODERNIZATION

PROPOSED METHOD TO ACCOMPLISH THE WORK



Erickson-Hall **Construction**

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plawlor@ericksonhall.com

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PROPOSED METHOD TO ACCOMPLISH WORK

Estancia High School
Theater Project

PROPOSED METHOD TO ACCOMPLISH THE WORK

Erickson-Hall understands that lease-leaseback project delivery puts us in partnership with the District and your design team, Pfeiffer Architects, to maximize construction value and quality standards within established budget and schedule parameters. Lease-leaseback project delivery will allow us to select the lowest responsive bidders which will ensure that subcontractors selected will meet performance and quality standards set by the contract documents. Erickson-Hall's lease-leaseback team will take "ownership" of District goals and objectives and work in cooperation and transparency with the District to deliver the Estancia High School Theater within an agreed upon Guaranteed Maximum Price.

■ PRECONSTRUCTION PHASE ACTIVITIES

Immediately upon contract award, Erickson-Hall will begin working closely with Pfeiffer Architects to assist in developing design solutions which work best with the District's budget and program needs. Our team will provide detailed construction estimates at each stage of design, and will perform value engineering analyses to assure District construction dollars are maximized. We will reach out to a minimum of four bidders to obtain real time pricing for the various categories of work while developing the project budget. During this process, we will have our staff and the subcontracting community produce constructability and scoping questions to assure we provide an extremely accurate costing analysis. We will provide initial baseline pricing, as well as progress pricing as the documents move through the design and DSA permitting process. The District will be provided with a variance report detailing changes in costs and the reasoning behind those changes. The initial baseline budget will be produced within four weeks of Notice to Proceed.

During each budget submissions, Erickson-Hall will work through and submit value engineering options for District consideration. Our approach to value engineering is to look for alternate, less costly, means, methods, and building systems that will not alter the original design intent. We will look at the entire cost of the design, construction, as well as the operating costs of each system. On a recent gymnasium and classroom modernization project at Griffiths Middle School, Erickson-Hall found a way to revise the site phasing plan which eliminated the need for nine temporary portables that were in the original scope. This resulted in a credit to the District in the amount of \$177,805. Our team also presented an option to remove the seven foot tall gymnasium building letters facing the back of campus. The resulting savings was more than \$1,000 per letter. Additional value engineering efforts at Griffiths Middle School included switching the gymnasium lighting to a more cost effective system resulting in a savings of \$40,000, switching the sliding glass door to an overhead

coiling door resulting in a savings of \$35,000, and revising site finish details. Erickson-Hall's proposal to switch the site finish from a 6" concrete section over 6" of sand to a drivable asphalt around the gymnasium resulted in another \$20,000 of project savings.

Preconstruction meetings will be held on a bi-weekly basis to ensure progress of the design and budgeting information is meeting District timelines. These meetings will also ensure all regulatory approvals and requirements are met, prequalification and labor compliance programs are understood, and all District and site milestones are taken into consideration prior to releasing documents for bid.

In conjunction with the District, our team will create a bid schedule, general conditions, special conditions and bid forms to clearly explain the bidding and contract requirements for the project. These bid forms will support the requirement to provide open book pricing for the work. We will issue and post DVBE advertisements, as well as perform an aggressive outreach campaign in order to achieve District local participation and DVBE goals. All addenda management, including pre-bid RFIs, substitution requests, and contract questions will be managed by Erickson-Hall staff.

Constructability reviews during the preconstruction phase will not only include detailed design document reviews, but also "boots on the ground" site verifications. During school holidays, Winter Break, and Spring Break, Erickson-Hall will be onsite validating existing conditions, locating existing utilities, and confirming all aspects of the design documents work with existing conditions.

In addition to our thorough constructability reviews, Erickson-Hall has an in-house Building Information Modeling (BIM) Manager who will; completely model all aspects of each new building. In our early review of the project plans, we noticed some potential conflicts between HVAC ducting and fire sprinklers in the corridors, structural conflicts in and around the catwalks and stage electrical pathways, roof drain conflicts around the fly tower, and general conflicts between utility lines in the restrooms. All of the conflicts will be flushed out during our BIM process, before construction begins.

Additional constructability reviews will focus on the Estancia Theater Building "dance floor" platform to be constructed over the seating, making sure it allows for safe access to overhead low voltage and electrical equipment, seismic attachments of the



acoustical components like the ceiling clouds, the single line drawings and verifying that all panels are powered with proper phasing and voltage, sloping and steps in and around the main seating area and their coordination with the building footings and the underground utilities, verifying keying requirements to ensure that catwalk access is restricted, and a thorough review of the stage rigging and theater audio visual equipment.

■ CONSTRUCTION PHASE ACTIVITIES

After plans are complete and buildable, bidding will begin. Erickson-Hall will host a series of job walks and community outreach events with the goal of generating the interest of the small business and local business communities, as well as DVBE contractors. State and local laws and regulations, including skilled and trained workforce requirements, will be discussed in our outreach events to ensure all bidders are aware and can comply with these laws. Finally, a thorough prequalification process will be run through Erickson-Hall, with a focus on mechanical, electrical, and plumbing contractors, as well as theater rigging and lighting contractors. This prequalification process will ensure we receive competitive bids from only qualified and capable contractors.

Erickson-Hall will mobilize onsite as shown on the Site Utilization Plan included in this section. Our focus will be on minimizing impacts to students and staff and to make sure Estancia High School continues to operate “business as usual” as we move throughout construction. Safety will remain our highest priority throughout the full course of construction. Erickson-Hall staff will be the first to arrive onsite and the last to leave the site every day.

Early focus will be placed on the long lead materials, including:

- Steel Roof Framing - currently taking 5 months to procure.
- CMU Block - currently taking 3 months to procure and is needed onsite early in the project as shown on the attached baseline schedule.
- Stage Rigging and Lighting - currently taking 9 months to procure.
- Electrical Gear - currently taking upwards of a year to procure.
- Rooftop HVAC Equipment - currently tracking as 6 months to procure.

■ POST CONSTRUCTION SERVICES

During the construction phase, record drawings (as-builts) will be maintained at the sites by our Superintendent. He will ensure subcontractors update record drawings daily to reflect underground and concealed work. Upon construction completion, record drawings will be scanned and saved electronically. Our team will consolidate and provide electronic and hard copy files in tabbed binders

for O&M Manuals and Warranties. Record submittals will be saved and incorporated into electronic O&M Manuals. We will schedule training for District personnel following start-up and commissioning. If feasible, training will be videotaped for future use. Erickson-Hall's project team will complete Verified Report Form DSA-6 and assist design teams with back-up documentation for all project changes. The District will be provided an electronic copy of all accounting records to support OPSC audit.

A Site Utilization Plan and Preliminary Schedule are provided in this section.

■ SKILLED AND TRAINED WORKFORCE

Having certified payroll information managed through LCP Tracker has allowed us to better manage our Skilled and Trained Workforce Compliance Program. The incorporation of SB693 relieved some significant pressure on the participation rates for many trades, and as a result, Erickson-Hall has been able to comply with the required rates. These challenges will become apparent as school districts release more work, encumbering a smaller workforce. Labor will begin to reach maximum capacity. Our plan is to continue to engage strong, active subcontractors and gain commitments to bid and work on our projects. A brief outline of our Skilled and Trained Workforce Compliance Program is provided below. A full size sample monthly report is provided immediately following this page:

- For new projects a Skilled and Trained Workforce Compliance Package, which includes an instructional memo and a State Regulation Compliance Statement, is issued with every subcontract agreement and a project tracking log is created.
- Accounts Payable refers to the log prior to issuing subcontractor payments.
- As percentage requirements adjust each year, new compliance packages are distributed to contractors.
- The Field Administrator assigned to each project is responsible for logging whether or not a subcontractor has been on-site and whether monthly compliance reports are received.
- Compliance letters collected from contractors currently working on-site are submitted to Owners thirty (30) days in arrears (i.e. current month compliance letters are submitted with the following month's Owner billing).
- Failure to submit skilled workforce compliance documentation monthly will result in immediate stop payment of contract funds owed to the entity that is not in compliance with State Regulation requirements.



PROPOSED METHOD TO ACCOMPLISH WORK

Estancia High School
Theater Project

- Contractors are required to submit monthly compliance reports to Erickson-Hall on or about the 10th of each month certifying skilled workforce compliance for any on-site work performed during the previous month. Compliance letters collected on the 10th of each month are forwarded to the Owner with month end billing.

▪ **LOCAL PARTICIPATION**

Erickson-Hall has been successful meeting a broad range of participation goals and/or showing a “Good Faith Effort” on construction projects awarded to us by military, city and state agency clients. We work diligently to identify viable concerns during the bid process to ensure that these goals are met or exceeded. Our commitment to achieve and/or exceed participation goals for small, local, emerging, minority, woman-owned, disadvantaged-owned, and disabled veteran businesses is demonstrated by our performance on the following representative project examples:

- » **Oxford Academy**
Anaheim Union High School District
Local Participation - 20%
- » **Savanna High School Modernization**
Anaheim Union High School District
Local Participation - 20%
- » **Marshall Elementary School**
Anaheim Elementary School District
Local Participation - 18%
- » **Clara Barton Elementary School**
Anaheim Elementary School District
Local Participation - 37%
- » **Lincoln Elementary School**
Anaheim Elementary School District
Local Participation - 28%
- » **Thomas Jefferson Elementary School**
Anaheim City School District
Local Participation - 15%
- » ▪ **McKinley Elementary School HVAC Upgrade**
Long Beach Unified School District
Local Participation - 18%
- » **MacArthur Elementary School HVAC Upgrade**
Long Beach Unified School District
Local Participation - 18%
- » **Griffiths Middle School Modernization**
Downey Unified School District
Local Participation - 18%
- » **Los Alamitos High School STEM Building**
Los Alamitos Unified School District
Local Participation - 22%
- » **Hermosa Vista School**
Hermosa Beach City School District
Local Participation - 20%

OUTREACH

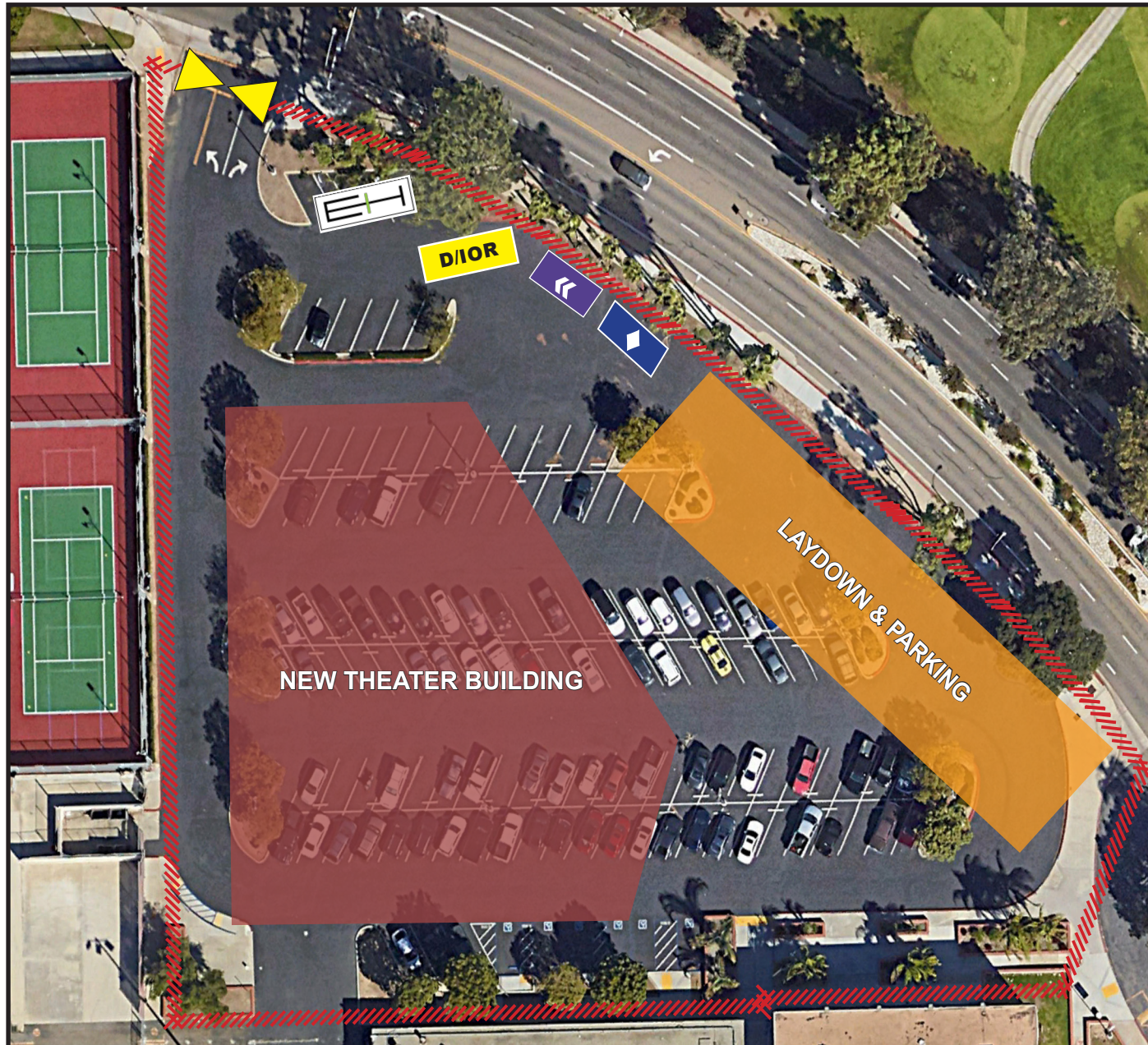
Advertisements are placed a minimum of two times in publications prior to the published bid date.

- **Advertisements in DVBE, minority-focused, and local publications and websites soliciting bids**
 - » The California Disabled Veterans Business Alliance
 - » Veteran Owned Business.com
 - » dgs.ca.gov for California Certified Minorities
 - » ccr.gov for Federal Certified Minorities
 - » dsbs.sba.gov for Small Disadvantaged Businesses
 - » cpuc.ca.gov. Builders, Challenge News
 - » National Association of Minority Contractors
 - » Compliance News
 - » City/County-specific Publications
- **Erickson-Hall In-House Database**
 - » As a Southern California-based general contractor and construction manager, Erickson-Hall maintains and regularly updates our in-house database of local, small, disadvantaged and veteran-owned businesses within five (5) Southern California Counties.
 - » Erickson-Hall utilizes the State of California's DVBE website for current directory of DVBE firms to ensure in-house database is up-to-date.
 - » Bid invites are faxed and emailed to prospective prime/trade contractors and vendors. Each bid invite includes a response card for the recipient to forward back to our office. The estimating staff tracks response cards and actively makes follow-up phone calls to solicit bid participation by desired businesses.
- **Bid Management**
 - » As bids are received, our estimating staff tracks business classifications. The bid tabulation includes subtotals to highlight percentage of participation by various classifications. Final subcontractor and vendor selections are determined in view of the District's desired participation goals.



PROPOSED METHOD TO ACCOMPLISH WORK

Estancia High School
Theater Project



ESTANCIA HIGH SCHOOL THEATER PROJECT

SITE UTILIZATION PLAN

LEGEND

-  Erickson-Hall Trailer
-  District / IOR Trailer
-  Laydown and Parking
-  Toilets | Wash Stations
-  Dumpster
-  Access Gate
-  Temporary Fencing
-  New Theater Building

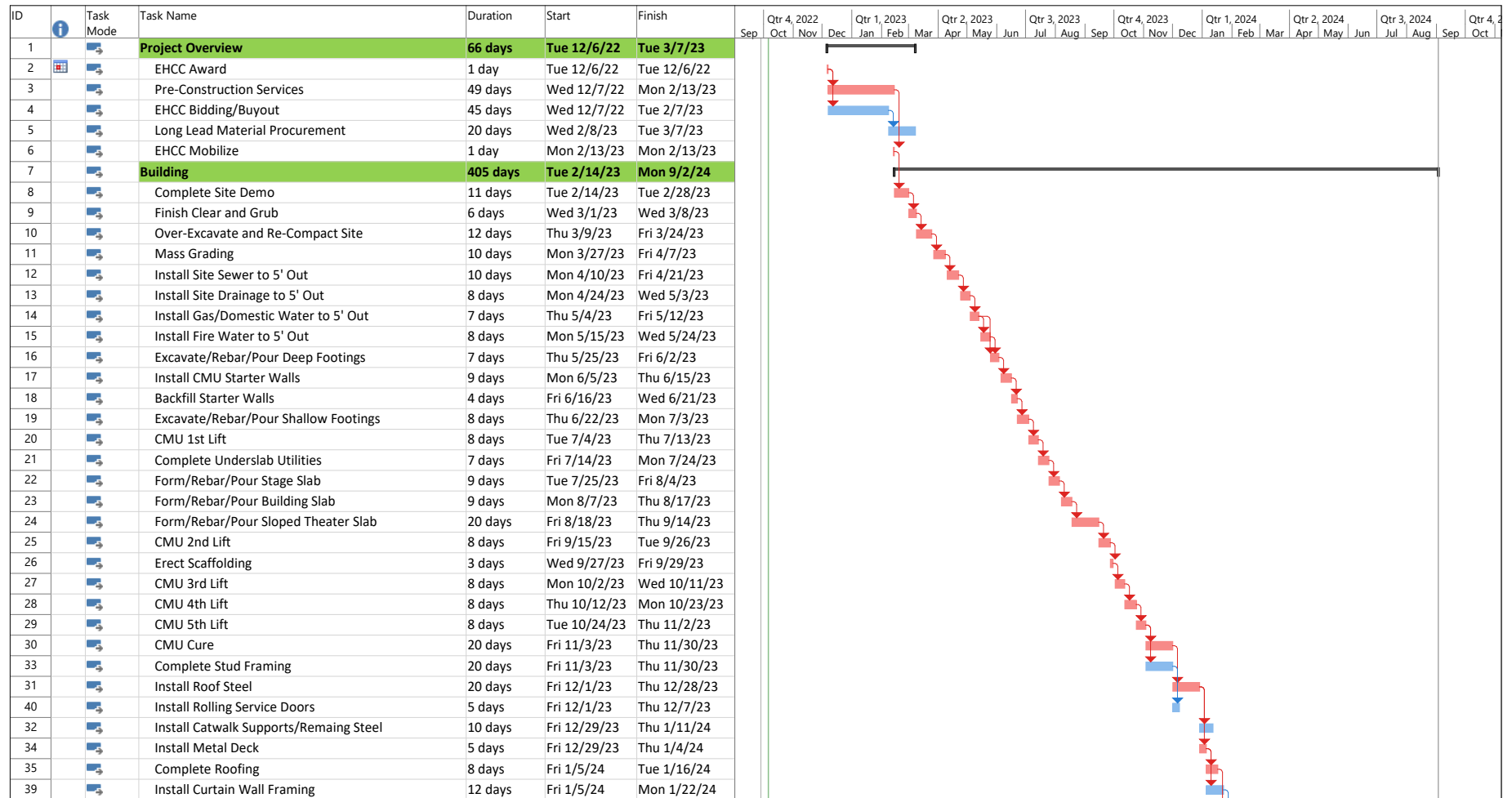


Erickson-Hall Construction
An Employee Owned Company



PROPOSED METHOD TO ACCOMPLISH WORK

Estancia High School
Theater Project



Project: Estancia Theater Sched
Date: Thu 10/6/22

Task

Split

Milestone

Summary

Project Summary

Inactive Task

Inactive Milestone

Inactive Summary

Manual Task

Duration-only

Manual Summary Rollup

Manual Summary

Start-only

Finish-only

External Tasks

External Milestone

Deadline

Critical

Critical Split

Progress

Manual Progress



Project: Estancia Theater Sched Date: Thu 10/6/22	Task		Inactive Task		Manual Summary Rollup		External Milestone		Manual Progress	
	Split		Inactive Milestone		Manual Summary		Deadline			
	Milestone		Inactive Summary		Start-only		Critical			
	Summary		Manual Task		Finish-only		Critical Split			
	Project Summary		Duration-only		External Tasks		Progress			

PRICING & CONTINGENCY



Erickson-Hall **Construction**

500 Corporate Drive
Escondido, CA 92029
RFP/P Contact: Penny Lawlor
760.796.7700 p
760.796.7750 f
plawlor@ericksonhall.com

■ ■ build on our reputation



PRICING & CONTINGENCY

General conditions will be priced to include all labor, material, software, and equipment required to support the management of the Estancia Theater Project. Based on a job of this size, we anticipate a monthly general conditions cost of **\$99,617**.

These monthly general conditions will include complete and full time management and supervision, quality and safety control, ProCore document control software, owner and Erickson-Hall jobsite trailers, and all maintenance, supplies, and services required to operate those trailers.

- **LLB Entity Fee** – 4%
- **Preconstruction Fee** - \$107,454
- **Special Conditions (if any)** - \$0
- **General Conditions Table** – Included in this section.
- **Bonds and Insurance** – 2.9% (Bond 1%, G/L Insurance 1%, Builder's Risk .9%)
- **Contractor's Contingency** – 1%
- **District Contingency** – 3%

GRIFFITHS MIDDLE SCHOOL MODERNIZATION





PRICING & CONTINGENCY

Estancia High School
Theater Project

Contractor's General Conditions / General Requirements in its Performance of the Work	Amount
Supervision/Staff	
Operations Manager	\$ 0
Project Executive	\$ 165/Hr
Project Manager	\$ 116/Hr
Project Superintendent And Asst. Superintendent (Negotiable)	\$ 132/Hr
Project Engineer	\$ 90/Hr
Scheduling Engineer	\$ 90/Hr
Estimator	\$ 122/Hr
Constructability Reviewer	\$ 90/Hr
Quality control Manager	\$ 0
MEP Coordinator	\$ 0
Field Engineer	\$ 0
Draftsman/Detailer	\$ 0
BIM Manager/Coordinator	\$ 90/Hr
Record Drawings	\$ 0
Field Accountant	\$ 0
Labor Compliance Manager	\$ 0
Time Keeper/Checker	\$ 0
Secretarial/Clerk Typist	\$ 60/Hr
Independent Surveyor	\$ 0
Safety &. E.E.O. officer	\$ 0
Field Offices for GC, Inspector, and Owner	
Office Trailer/Rental, Set-up, Tear-down, Relocation – 12' x 60' for Contractor	\$ 1,600/Mo
Office Trailer/Rental, Set-up, Tear-down, Relocation – 24' x 60' for District Construction Manager and Inspector and on-site meetings	\$ 1,600/Mo
Office Furniture/Equip/Computers	\$ 750/Mo
Telephone/Data Installation	\$ 0
Telephone/Data Monthly Charges	\$ 450/Mo
Elect Power Installation	\$ 0
Elect Power Distribution Wiring	\$ 0
Water Service - Installation	\$ 0
Heating & Cooling Costs	\$ 0
Light Bulbs & Misc. Supplies	\$ 1,000/Mo
Recycling/Trash Dumpster Removal/Hauling	\$ 1,250/Mo
Maintenance Services (janitorial, holding tank, etc.)	\$ 1,500/Mo
Drinking Water/Cooler/Cup	\$ 150/Mo
Documents/Records/Misc.	
Xerox Copies/Misc Printing	\$ 0
Electronic Drawing Transfer- Document Control Software (ProCore)	\$ 1,400/Mil
Printing - Drawings & Specifications	\$ 0
As-built Drawing Reproduction	\$ 0
Postage/UPS/FedEx	\$ 0
Project Photographs and Video	\$ 2,500
Closeout documentation – manuals, warranties, DSA documents	0
Jobsite Operations	
Storage Trailer & Tool Shed Rental	\$ 400/Mo
Safety/First Aid Supplies/Safety Signage	\$ 272/Mo
Fire Fighting Equipment	\$ 0
Security Guards	\$ 0
Temporary Parking	\$ 0

Superintendent **Dr. Wesley Smith**
2985 Bear Street · Costa Mesa · California 92626 · (714) 424-5000



PRICING & CONTINGENCY

Estancia High School
Theater Project

Watchman Service	\$ 0
Other	
Subcontractor bond or subcontractor default insurance costs	\$ 1%
Bidding Costs	\$ 0
Facility Operator/Training	\$ 0
Safety Inspections	\$ 800/Mo

END OF ADDENDUM

Superintendent Dr. Wesley Smith
2985 Bear Street · Costa Mesa · California 92626 · (714) 424-5000

APPENDICES



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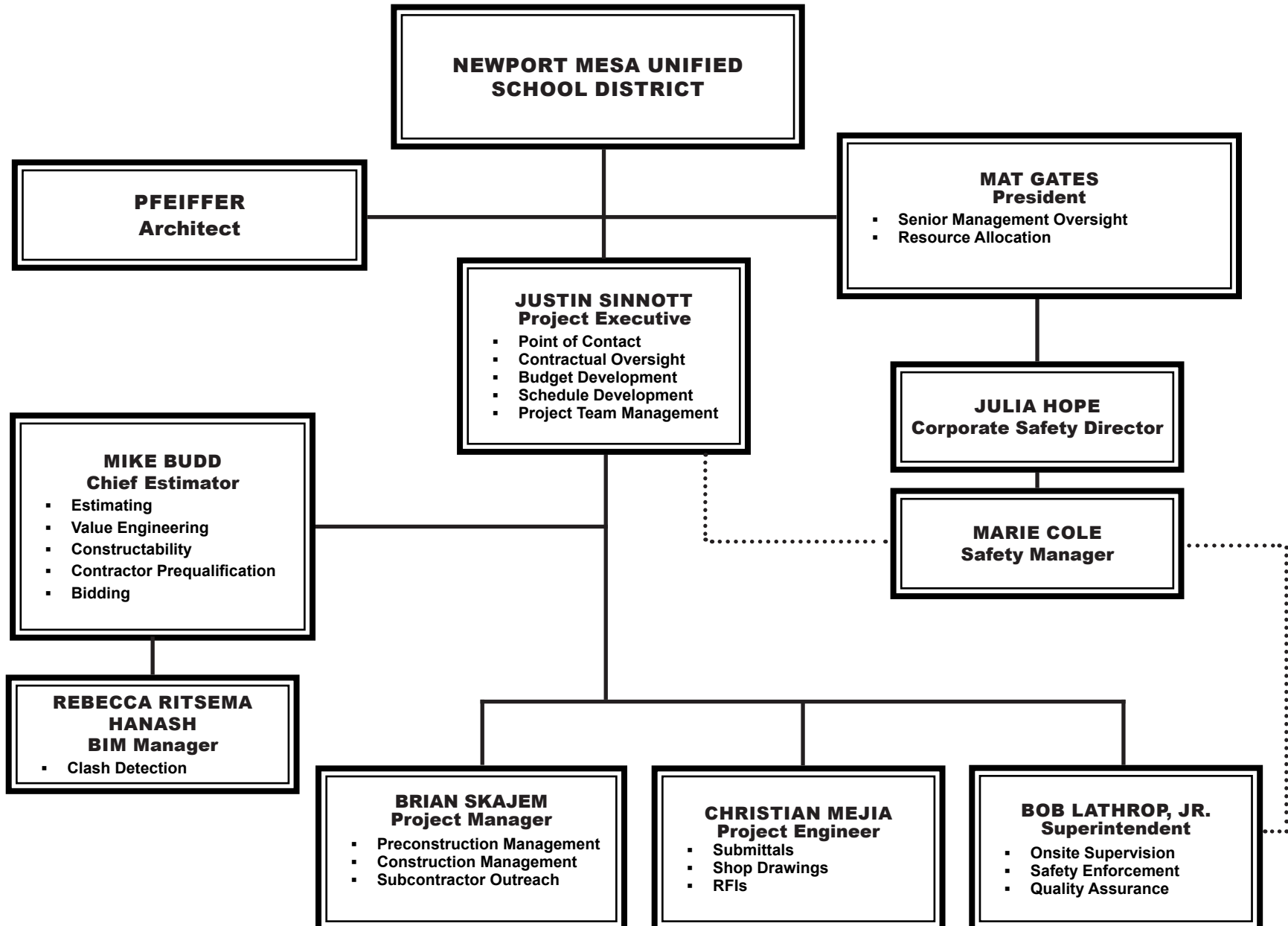
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APPENDICES - STAFFING RESOURCES

Estancia High School
Theater Project





EDUCATION

B.S. Structural Engineering
Jacobs School of Engineering
University of San Diego

CERTIFICATIONS

- Certified Construction Manager

TRAINING

- Concrete & Masonry
- Confined Spaces Awareness
- OSHA 30-Hour
- OSHA Lead Awareness
- CPR | AED | First Aid
- Heat Illness
- Asbestos Awareness
- Personal Protective Equipment Awareness
- SWPPP
- Leadership Development Training
- Defensive Driver Training

REFERENCES

David Miranda
Executive Director
Long Beach Unified School District
562.997.7555

Vince Madsen
Senior Director, Facilities Planning
Downey Unified School District
562.469.6707

Nancy Nien
Former Assistant Superintendent
Los Alamitos Unified School District
Current Assistant Superintendent
Anaheim Union High School District
714.999.3555

JUSTIN SINNOTT, CCM

Vice President | Project Executive

Justin Sinnott, a Certified Construction Manager, joined Erickson-Hall in 2014; his construction industry career spans 20 years of K-12 modernization and new construction. Justin's responsibilities include planning, coordinating and managing complex facility construction from inception to close-out. He will ensure our team delivers a functional, financially viable project within established cost and schedule parameters. As Project Executive, Justin will provide senior management oversight of all preconstruction and construction phase activities. He will participate in site specific construction meetings and will assist our Project Manager and Superintendent to establish and enforce stringent, project-specific quality and jobsite safety standards.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Sage Creek High School Performing Arts Center (11/2016 - 5/2018)

Carlsbad Unified School District - \$15.5 Million

Lease-leaseback delivery of a 17,272 SF Performing Arts Center featuring a 345-seat auditorium, wood floor stage, black box seating and dressing rooms.

Oxford Academy (5/2018 - 9/2019)

Anaheim Union High School District - \$8.8 Million

Lease-leaseback delivery of a 6,500 SF music building. Site work encompassed abatement of transite pipe, courtyard modernization, landscaping, path of travel upgrades and campus-wide installation of perimeter fencing. Work scope included conversion of library and choir room into STEAM classrooms and workshop.

Los Alamitos High School STEM Building (3/2020 - 10/2022)

Los Alamitos Unified School District - \$52 Million

Lease-leaseback delivery of a 3-story, 86,000 SF STEM (Science, Technology, Engineering & Mathematics) Classroom Building on an occupied high school campus. The new classroom building houses a computer lab, robotics lab, media center, career center, science and chemistry labs, and 17 classrooms.

Griffiths Middle School Modernization (6/2019 - 11/2021)

Downey Unified School District - \$39.4 Million

Lease-leaseback delivery of a 19,420 SF, 2-story classroom building and a 13,950 SF gymnasium, as well as modernization of 14 buildings and installation of 8 portable classroom buildings.

Doty Middle School Modernization (6/2020 - 12/2021)

Downey Unified School District - \$34 Million

Lease-leaseback delivery of a 21,720 SF, 2-story classroom building with 2 towers connected by a bridge and a 13,990 SF gymnasium featuring a stage/performance platform.

Sato Academy (6/2018 - 8/2019)

Long Beach Unified School District - \$16.5 Million

Lease-leaseback delivery of a 34,000 SF CTE building housing science classrooms, regular classrooms, Career Technical Education (CTE) classrooms, restrooms and storage rooms.

Magnolia High School Center for Excellence

Anaheim Union High School District - \$30 Million

Lease-leaseback delivery of a high school campus with an aquatics center, performing arts, and video production facility (currently in preconstruction).



CERTIFICATIONS

- Construction Manager Course Certification
- Construction Manager Association of America
- Construction Quality Management for Contractors Certificate

TRAINING

- CPR | AED | First Aid
- OSHA Lead Awareness
- OSHA 30-Hour
- SWPPP
- Heat Illness Awareness
- Confined Space
- Trench Safety
- Asbestos Awareness
- Defensive Driver Training

REFERENCES

Scott Harvey
Senior Executive Director, Facilities
and Planning
Orange Unified School District
657.291.3260

Gregory Hann
President/Architect
Empire Design Group
951.809.7601

David Miranda
Executive Director
Long Beach Unified School District
562.997.7555

BRIAN SKAJEM, CCM Senior Project Manager

Brian Skajem joined Erickson-Hall in 2022; his 30-year construction industry career has been concentrated in modernization and new construction of California K-12 school facilities. As Senior Project Manager, Brian is charged with preconstruction, construction, and post-construction tasks such as budget, validation, value engineering, field orders and surveying as-built conditions, as well as assisting in assurance of contract compliance, monitoring the timely submission of shop drawings, submittals and product data. Brian will manage weekly owner construction meetings, oversee site construction meetings, establish and update the project budget, review changes to the budget and project scope, and approve subcontractors' monthly progress payments. During construction, he will monitor execution of the project schedule and assist with resolving any challenges arising in the field..

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Jordan High School Classroom Building

Long Beach Unified School District - \$29.8 Million

Lease-Leaseback delivery of the demolition of 4 existing buildings to make way for the construction of a new 2-story, 53,500 SF steel framed classroom building. The new classroom building houses special education classrooms, general education classrooms, a career center, offices, treatment simulation lab, science and technical education labs, and a computer lab. Site work encompasses deep soil mixing for building foundation, site work, related infrastructure, installation of 4 shade structures and 1 lunch shelter, irrigation, landscaping and associated flatwork.

El Medina High School Aquatic Center

Orange Unified School District - \$11.5 Million

Scope of work included demolition of the existing pool facility and reconstruction of a new pool facility encompassing a score board, equipment storage area, equipment building, and training center. Site work entailed of site concrete construction, area lighting, off-site improvements that tie into the existing storm drain system with a new drainage facility, curb & gutter, sidewalk, ADA ramps, asphalt paving, striping and signage.

Naranca Elementary Modular Classroom Building Installation

Cajon Valley Union School District - \$2.5 Million

Scope of work included asbestos abatement and relocation of 4 modular classrooms. Site work encompassed grading, underground utilities, water, sewer, storm drain, site concrete work, sidewalks, curb & gutter, asphalt paving, sewer lift station, irrigation and landscaping improvements.

Anthony Munoz Community Center

City of Ontario, CA - \$13.2 Million

Scope of work included demolition of the existing facility, construction of a new 13,000 SF Community Center housing multipurpose rooms, modern teaching kitchen, two activity classrooms, toddler room with an outdoor play area, administrative office space, and a 25 yard recreational pool with an enclosed outdoor patio area with multiple canopies. Site work encompassed curb & gutter, sidewalk, water sewer, and storm drain improvements, landscape & irrigation improvements and a new asphalt parking lot.



EDUCATION

Southern California College

TRAINING

- CPR | AED | First Aid
- OSHA 10-Hour
- OSHA Lead Awareness
- SHPT
- SWPPP
- HazCom - GHS
- Asbestos Awareness
- Scaffolding Awareness
- Fall Protection Awareness
- Underground Safety Awareness
- Confined Space Competent
- Trenching & Excavation
- Electrical Hazards
- Defensive Driver Training
- New Air Pollution Control District Reg.
- Leadership Development Training
- Heat Illness

REFERENCES

David Bennett
Assistant Superintendent,
Facilities & Operations
Lowell Joint School District
562.902.4291

Sheere Bishop-Griego
Director of Procurement & Contract
Management
Santa Monica-Malibu Unified School
District
310.450.8338, ext. 79385

David Miranda
Executive Director
Long Beach Unified School District
562.997.7555

ROBERT (BOB) LATHROP, JR. Superintendent

Robert Lathrop, Jr. joined Erickson-Hall in 2005; he has over 30 years of experience in the construction industry with extensive experience in new construction and modernization of California K-12 school facilities. As Superintendent, Bob is responsible for project schedule execution, coordination of trade contractors, as well as oversight of all jobsite activities, and assisting the team with constructability reviews. Throughout construction, Bob will manage the jobsite, execute the construction schedule, ensure site security, and enforce Erickson-Hall's quality control and national award winning safety programs. Other construction phase responsibilities include conducting construction safety and subcontractor coordination meetings throughout the duration of each project. During closeout, Bob will take the lead on creating the punch list, final inspections and the commissioning of facilities.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Lowell Joint School District - Various Projects

- Maybrook Elementary School - \$1.8 Million
- Olita Elementary School HVAC & Re-Roofing - \$4.4 Million
- Macy Elementary School HVAC & Roof Upgrades - \$5.1 Million
- Jordan Elementary School HVAC & Roof Project - \$8.5 Million

Riley Elementary School HVAC Upgrades

Long Beach Unified School District - \$11.8 Million

Comprehensive preconstruction and construction phase services for a whole site modernization of the elementary school campus encompassing extensive site and building demolition followed by a campus-wide upgrade to the school's HVAC system.

Santa Monica High School Science & Technology Building Phase 2

Santa Monica-Malibu Unified School District - \$4 Million

Comprehensive preconstruction and construction phase services for electrical work at 7th court alley for services to the new Science & Technology building; West site improvements at 6th/Olympic St. including installation of underground utilities and electrical; and completion of the Utility Building.

Fullerton Joint Union High School District - Various Projects

Construction Management - \$98 Million Bond Program

Construction Management services for FJUHSD's modernization and new construction projects utilizing the CM Multiple Prime delivery processes.

Rowland Unified School District - Various Projects

Program Management Services - \$150 Million Bond Program

- Program Management Services on RUSD's 2006 Measure R GO Bond fund projects encompassing the modernization and new construction of multiple K-12 school projects. A few project highlights include:
 - » Alvarado Intermediate Modernization
 - » Fajardo Elementary School Library Modernization
 - » Hurley Elementary School Modernization
 - » Oswalt Academy K-8 Conversion
 - » Rowland High School CTE Info Tech
 - » Nogales High School Revival Project

Little Lake City School District Restroom Renovations

Little Lake City School District - \$3.6 Million

Renovation of 56 restrooms across 4 elementary school campuses for the Little Lake City School District.



EDUCATION

B.S. Construction Management
California Baptist University, 2018

TRAINING

- OSHA 30-Hour
- Asbestos Awareness

REFERENCES

Nancy Nien
Assistant Superintendent, Business
Services
Anaheim Union High School District
714.999.3555

Ryan Ekstrom
Design Associate
Johnson Favaro
310.559.5720

David Bennett
Assistant Superintendent,
Facilities & Operations
Lowell Joint School District
562.902.4291

CHRISTIAN MEJIA Senior Project Engineer

Christian Mejia joined Erickson-Hall in 2020; he offers almost a decade of construction industry experience with private, residential, and various public works projects, including the modernization and new construction of California K-12 school facilities. As Senior Project Engineer, Christian will assist our Project Manager and Superintendent in monitoring and tracking construction progress and document control compliance issues. He will maintain positive relationships with the District, design team, consultants and trade contractors throughout the full course of the project. Christian is charged with accurately preparing quantity surveys and pricing of proposed changes, field orders and ensuring as-built conditions are documented. He will assist in the assurance of contract compliance, and be responsible for the timely submission of shop drawings, submittals and product data. His duties also include preparation of monthly billings and overseeing preparation of post-construction submittals including warranties, operation and maintenance manuals, and guarantees.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Jordan Elementary School - HVAC & Roof Project Lowell Joint School District - \$8.5 Million

Scope of work included removal of existing HVAC system in all classrooms and replace with rooftop package units, install fire alarms, and installation of three new modular buildings across the campus.

Macy Elementary School HVAC & Roof Upgrades Lowell Joint School District - \$5.1 Million

Lease-leaseback delivery of the removal and replacement of the existing roof systems on all permanent buildings, removal of all existing HVAC systems in classrooms and replaced with rooftop package units, and installation of fire alarms at all permanent and relocatable buildings located on campus.

Olita Elementary School HVAC & Re-Roofing Lowell Joint School District - \$4.4 Million

Lease-leaseback delivery of the roofing modernization across seven buildings on the Olita Elementary School campus. Scope of work includes demolition of existing roofing, re-roofing and setting new HVAC units.

Maybrook Elementary School Lowell Joint School District - \$1.8 Million

Construction management of various site improvements and landscaping adjustments to facilitate the installation of 14 new classroom portables and two new restroom portables.

AUHSD CARES Project Anaheim Union High School District - \$1.7 Million

Scope of work included new concrete for and installation of shade structures across 7 campuses in AUHSD. Additional scope encompassed installation of handrails, underground electrical and future irrigation, and fencing.

Lion Park Project City of Costa Mesa, CA - \$31.1 Million

Construction of a new 2-story, 22,500 SF library building housing conference rooms, computer station, and designated areas for age groups. Scope of work included construction of a underfloor system to accompany the mechanical and electrical systems, acoustical plaster ceiling system to minimize sound and two skylights architectural structural glass openings for natural daylight. Scope also encompassed a renovated wood framed 10,000 SF community center for City and personal events.



TRAINING

- CPR | AED | First Aid
- Defensive Driver Training
- Heat Stress
- Leadership Development Training

REFERENCES

Vince Madsen
Senior Director, Facilities Planning
Downey Unified School District
562.469.6707

C.J. Knowland
Director of Facilities
Los Alamitos Unified School District
562.799.4592

Christopher Delehanty
Executive Director
Del Mar Union School District
858.755.9301

MICHAEL BUDD

Chief Estimator

Mike Budd has been an integral part of Erickson-Hall's estimating team since 2014 and has over 30 years of construction industry experience with an extensive focus in California K-12 school projects. Mike is experienced in all facets of estimating including conceptual cost analysis, negotiated, firm-fixed pricing, subcontract solicitation, and bid analysis. As Chief Estimator, Mike is responsible for leading the creation of budgets and estimates, and the procurement of general/prime contractors for each project. His responsibilities include estimating deliverables such as cost estimating, bid management and bid packaging, value engineering analyses, and constructability reviews. He will

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Los Alamitos High School STEM Building Alamitos Unified School District - \$52 Million

Lead estimator for construction of an 86,000 SF STEM (Science, Technology, Engineering and Mathematics) encompassing a 3-story classroom building housing a large computer lab, 8 science labs, 2 chemistry labs, 17 classrooms and school administration. Site work consisted of new fire lanes and walkways, exterior grandstand staircase with stadium seating, seat walls by planters, loading zone, reconfiguration of 2 parking lots, and extensive landscaping.

Griffiths Middle School Modernization Downey Unified School District - \$39.4 Million

BIM Manager for delivery of a 19,420 SF, 2-story classroom building, a 13,950 SF gymnasium building with a performance platform, campus-wide modernization and technology upgrades to existing classrooms, demolition of existing structures and new construction of 23 relocatable classroom buildings on an occupied campus.

Doty Middle School Modernization Downey Unified School District - \$35 Million

BIM Manager for a campus-wide modernization of existing structures, construction of a new 28,000 SF, 2-story classroom building and a 14,000 SF gymnasium with retractable bleachers and a performance platform.

Cross Elementary School Imperial Unified School District - \$32.8 Million

Lead estimator for the construction of a 60,900 SF elementary school campus housing 4 classroom buildings, an administrative building, a multi-purpose building, 3 parking lots, and an exterior basketball/volleyball multi-use court.

Pacific Sky School Del Mar Union School District - \$53.6 Million

Lead estimator for a 4-building elementary school campus with all associated site improvements. The main building houses 19 classrooms, administration, 4 special education classrooms, offices for Speech, OT and APE, a combined library/innovation space, a multi-use room, and 3 STEAM classrooms, a 7,000 SF cafeteria/kitchen.

Murrieta Elementary School Classroom Expansion Murrieta Valley Unified School District, CA - \$12.5 Million

Preconstruction and construction phase services for the expansion of the Murrieta Elementary School campus.



EDUCATION

B.S. Architecture
Judson University, IL, 2003

Master Architecture
Judson University, IL, 2004

TRAINING

- CPR | AED | First Aid
- Defensive Driver
- OSHA LEAD Awareness
- OSHA 10-Hour
- Asbestos Awareness
- BIM

LICENSE

California Architect License C36186

REFERENCES

Paula Montalbo
Business Manager
Hermosa Beach City School District
310.937.5877

Vince Madsen
Senior Director, Facilities Planning
Downey Unified School District
562.469.6707

C.J. Knowland
Director of Facilities
Los Alamitos Unified School District
562.799.4592

REBECCA RITSEMA-HANASH, Architect BIM Manager

Rebecca Ritsema-Hanash, a licensed architect, joined Erickson-Hall in 2010. Her career encompasses approximately 15 years of design experience, including schematic design, design development, landscape design, and client interface, as well as 12 years of experience in construction document detailing. Rebecca is proficient in Revit Architecture 2011, AutoCAD Architecture (ACA) 2010. Her experience covers a broad range of project types, including California K-12 school facilities. She is a team player and takes pride in developing strong relationships with the entire project team to ensure a successful project delivery. She is responsible for providing network and inter-operability capabilities between collaborating organizations, both inside and outside the firm. She is responsible for establishing standards for BIM technology and work processes that provide efficient and effective planning, coordination, clash detection, and correction and procurement.

EXPERIENCE HIGHLIGHTS (A PARTIAL LIST)

Los Alamitos High School STEM Building Alamitos Unified School District - \$52 Million

BIM Manager for delivery of an 86,000 SF STEM (Science, Technology, Engineering and Mathematics) encompassing a 3-story classroom building housing a large computer lab, 8 science labs, 2 chemistry labs, 17 classrooms and school administration. Site work consisted of new fire lanes and walkways, exterior grandstand staircase with stadium seating, seat walls by planters, loading zone, reconfiguration of 2 parking lots, and extensive landscaping.

Griffiths Middle School Modernization Downey Unified School District - \$39.4 Million

BIM Manager for delivery of a 19,420 SF, 2-story classroom building, a 13,950 SF gymnasium building with a performance platform, campus-wide modernization and technology upgrades to existing classrooms, demolition of existing structures and new construction of 23 relocatable classroom buildings on an occupied campus.

Doty Middle School Modernization Downey Unified School District - \$35 Million

BIM Manager for a campus-wide modernization of existing structures, construction of a new 28,000 SF, 2-story classroom building and a 14,000 SF gymnasium with retractable bleachers and a performance platform.

Solana Vista Elementary School Reconstruction Solana Beach School District - \$32.8 Million

Lease-leaseback delivery of the reconstruction of the Solana Vista Elementary School campus. Scope of work includes demolition of the existing elementary school and construction of a new 60,000 SF campus.

Hermosa Vista School Hermosa Beach City School District - \$24.5 Million

BIM Manager for delivery of a new elementary campus consisting of a 2-story classroom building housing 15 classrooms, 2 flex lab rooms, library/learning lab, conference room, workroom, a teachers lounge, offices and rooftop photovoltaic panels. Scope of work included a single-story Multi-Purpose Building housing a kitchen, multi-purpose room, restrooms, storage rooms and rooftop photovoltaic panels.

ADDENDA ACKNOWLEDGMENT



Erickson-Hall **Construction**

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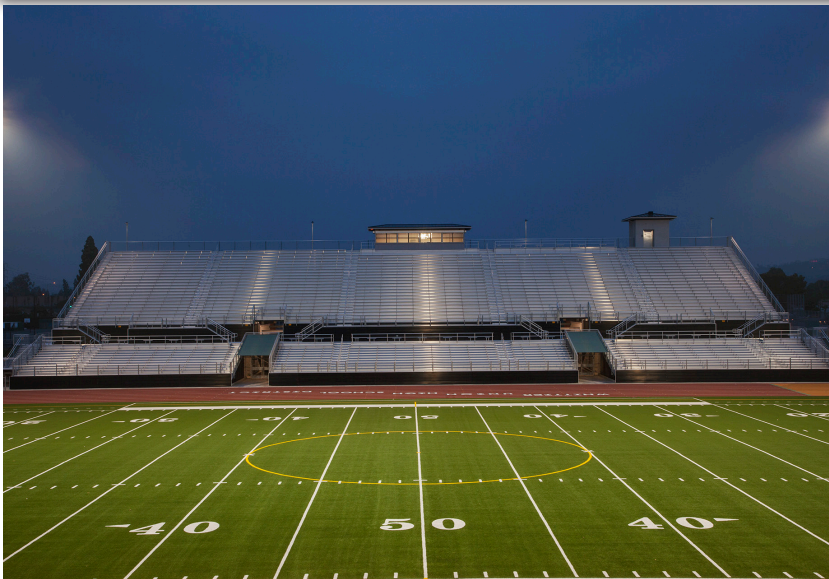
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ADDENDA ACKNOWLEDGMENT

Erickson-Hall acknowledges receipt of the following addenda:

- Addendum 1 dated September 6, 2022
- Addendum 2 dated September 7, 2022
- Addendum 3 dated September 13, 2022
- Addendum 4 dated October 5, 2022



**DICK TORRES MEMORIAL STADIUM
AND SPORTS COMPLEX
PIONEER HIGH SCHOOL**