

QUALIFICATIONS

CONSTRUCTION MANAGEMENT SERVICES RFQ#119-21



DUE: February 22, 2021 AT 4:00 PM

Submitted February 22, 2021 to:

Newport-Mesa Unified School District
Attn: Jonathan Geiszler, Director of Purchasing
& Warehouse
2985 Bear Street, Building A
Costa Mesa, California 92626

Presented By:

Lundgren Management Corporation
Margaret Lundgren, Executive Vice President
26330 Citrus Street, Valencia, CA 91355
P: 661-257-1805
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February 19, 2021

Newport-Mesa Unified School District
Jonathan Geiszler, Director of Purchasing & Warehouse
2985 Bear Street, Building A
Costa Mesa, CA 92626

Reference: RFQ #119-21 for Construction Management Services

Dear Mr. Geiszler,

Lundgren Management is pleased to present our qualifications to provide Project/Construction Management Services to the Newport-Mesa Unified School District. Lundgren has provided Program and Construction Management Services to the educational sector for 34 years, and our reputation for **minimizing risk** to clients is well known throughout the industry. All of our clients are vital components of our team and your appointed construction and planning staff will be seen in the same light. We will act as an extension of your staff, assuring that students and staff will not be disturbed during construction and all parties are properly informed through open paths of communication, ultimately helping Newport-Mesa Unified School District save time and money.

We understand that teamwork is integral to successful project outcomes. The Lundgren Management corporate philosophy is based on forming a Team where our clients and selected Lundgren Management experts work in conjunction with the design team, inspection team, contractors, and project consultants. The Lundgren Team will be your team and will be directly accountable for attaining the prescribed goals of your projects. Our versatility along with our experience in building educational facilities will ensure that budgets are achieved and completion dates are accomplished. Our project experience has required that we interface with DSA, OPSC, SAB, and CDE, as well as meet the requirements of DTSC, OSHA, CEQA and other local and state governmental agencies. Great care is taken to represent you, the owner, and establish a cohesive team atmosphere where participants can work collaboratively to accomplish their goals. Lundgren Management highly values our clients and is committed to providing the Newport-Mesa Unified School District with excellent service and in turn, forming rapport and mutual appreciation and support.

Our recent experience in modular building construction and breadth of new construction and modernization experience gives us an unmatched understanding of the scope of work at hand. The Lundgren team is **fully committed** to “stand with” and not just “stand by” your organization, with the common desire to complete all future projects **on time** and **within budget**. We trust that you will find that the needs of the Newport-Mesa Unified School District have been effectively addressed within this response and look forward to the opportunity to work with you and your team.

Respectfully,

Margaret Lundgren, Executive Vice President
Lundgren Management Corporation
margaret.lundgren@lundgren.net • P (661) 257-1805 • F (661) 257-1806

**NEWPORT MESA UNIFIED SCHOOL DISTRICT
CONSTRUCTION MANAGEMENT SERVICES
RFQ EVALUATION**

Evaluation of Firms: All responses will be scored using this evaluation sheet. A minimum score of 80% is required to qualify for the 2nd round of evaluation which includes review by a panel. Up to 10 additional points may be awarded in the second round based on subjective determination of the Firm's ability to carry out the required work. NMUSD will select the top-rated firms to be awarded the contracts for these services.

Instructions: Fill-in a response for each question in Sections 1-4 below. Each correlates to a required element in the RFQ Response Format.

Firm: Lundgren Management Corporation

1. Location/Accessibility	Write in:	Max.
a. Firm's location - Write in city and county of headquarters or local office, whichever is closest to the District	Valencia, Los Angeles County	5
2. Past Performance	Write in:	Max. Pts.
a. Identify the Firm's number of years' experience in providing services for K-12	34	5
b. Project listing - Identify the number of K-12 projects the Firm has worked on within last 3 years	16	5
c. Industry experience - Circle the type of projects the Project Team has worked on within the last 3 years (circle all that apply)	K-12 Community College Charter/ Private School Non- school District Other Project Types	5
d. Identify the Firm's number of employees	30	5
3. Claims, Lawsuits, Arbitrations	Write in:	Max. Pts.
a. Identify the number allegations against the firm or any employee for any violations of law	0	5
b. Identify the number of settlements or judgments involving such actions within the last five (5) years	0	5
4. Record of Past Performance	Write in:	Max. Pts.
a. Identify the number of client references from a K-12 school district included in the Response (0-3)	5	5

*I hereby certify that the above information is true and correct to the best of my knowledge.
By signing below, I further acknowledge that should any of the information I provide be found to be false,
the Firm's Response shall be considered nonresponsive and ineligible for consideration.*

Margaret Lundgren
Printed Name


Signature

2/19/21
Date



BUSINESS PROFILE

LEGAL FORM

Lundgren Management, established December, 1987 with a Class B - General Building Contractor License, is incorporated as a California "S" Type Corporation.

Lundgren Management Corporation License:
Classification: Class B License – General Building Contractor
License No: 494814
Issued: 07/07/1986
Expiration: 10/31/21
This license has never been suspended nor revoked
DIR #: 1000012970

OWNERSHIP STRUCTURE

Lundgren Management has one (1) Principal: Dale C. Lundgren, President and one (1) Executive Vice President: Margaret Lundgren.

FIRM HISTORY

Lundgren Management is a top ranking, full-service Construction Manager providing Construction, Project, and Program Management Services to a wide range of clients for over 34 years. Since our founding in 1987, Lundgren Management has specialized in school construction and modernization, and we are experts in the management of large, phased, complex projects using various delivery approaches. Lundgren is headquartered in Santa Clarita serving the Los Angeles, Orange, Riverside, San Bernardino, Kern, Ventura, and Santa Barbara counties of the greater Southern California area.

FIRM TEAM

Lundgren employs more than 30 construction professionals who are experienced with the planning, pre-construction activities, construction activities, and close outs of new school construction and modernization projects. Each of these professionals is degreed and/or has specific, firsthand knowledge of jurisdictional labor, construction methodologies, materials, regulatory requirements, and field operations. Many of our personnel also hold additional licensing, professional registrations and/or certifications, and their expertise is shared company-wide with other members of the Lundgren team.

Our project teams and staffing are tailored specifically to each project, based on the project complexity, project type, project needs, and project delivery method. During construction, our team will provide project administration/documentation, project accounting, and cost verification and validation. Our typical field management team consists of a Project Manager (the main point of contact); a Superintendent/Construction Manager who is responsible for trade contractor coordination; and project administrative staff (Project Engineer, Project Administrator, or both) who are responsible for project documentation and cost verification (Submittals, RFI's, CO Logs, change requests, and site project accounting). Our teams are most commonly





QUALIFICATIONS FOR CONSTRUCTION MANAGEMENT SERVICES (RFQ#119-21) NEWPORT-MESA UNIFIED SCHOOL DISTRICT

housed in a field office located onsite. We may adjust the number of project staff, based on the District's needs and to accommodate the complexity of project and/or workload.

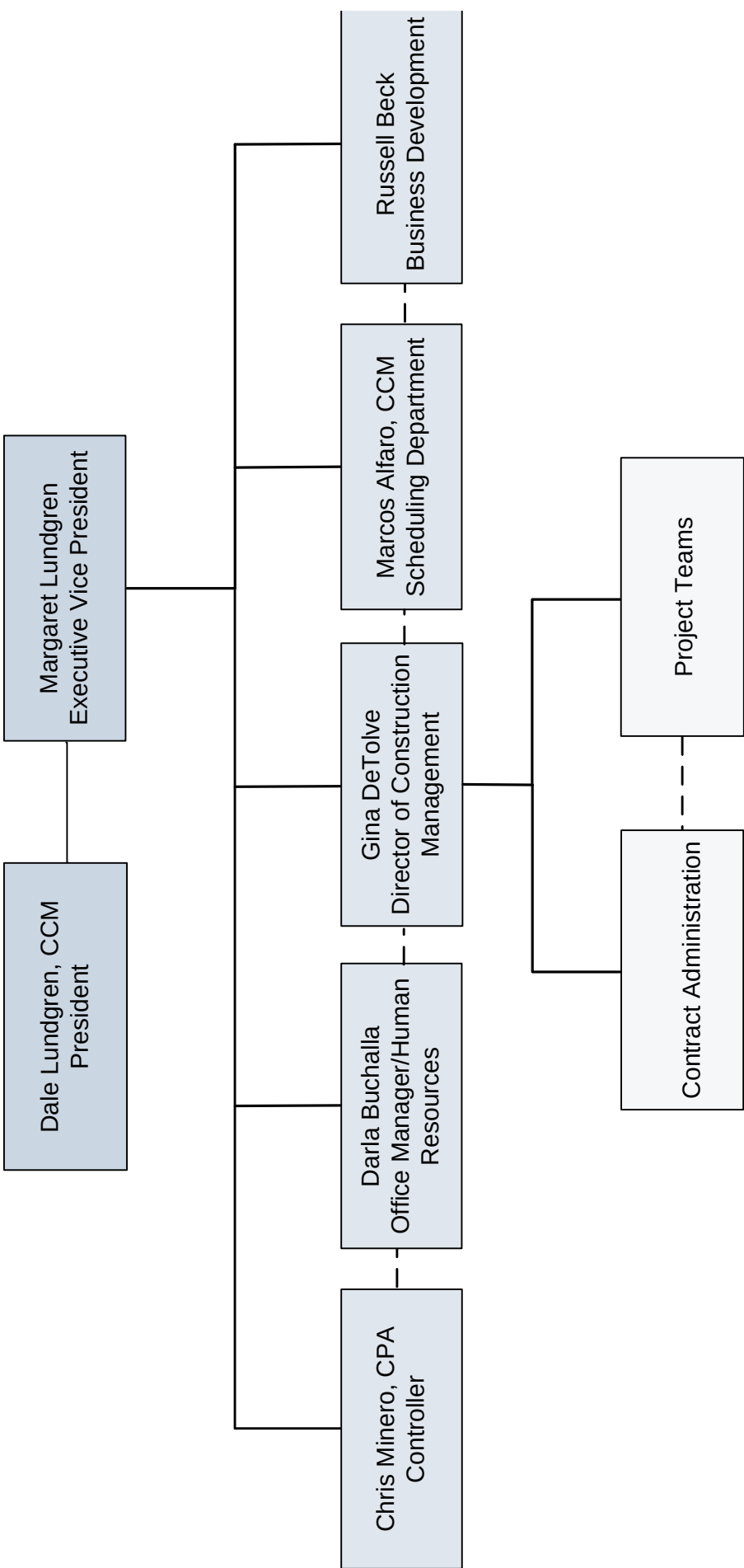
Corporate office staffing that will support each of our field teams include: Executive Vice President; Director of Construction Management; Contract Administrator; Scheduler; Estimator (sub-consultant); and Corporate Safety Director. They will monitor the projects from an executive level, evaluate the workload and staffing, allocate personnel as required to ensure both proper coverage and efficiency relative to the cost of the staff, and provide support to the District in the Community Relations area, as needed. Lundgren's senior team members are as follows:

- t Margaret Lundgren, Executive Vice President – 26 Years with Lundgren
- t Gina DeTolve, Director of Construction Management – 18 Years with Lundgren
- t Russell Beck, Regional Manager, Client Services – 7 Years with Lundgren
- t Marcos Alfaro CCM, Senior Scheduler – 17 Years with Lundgren
- t Patrick Lundgren CCM, Senior Project Manager – 22 years with Lundgren
- t Chris Minero, CPA, Controller – 14 Years with Lundgren

On the following pages, we have included resumes of corporate staffing, dedicated personnel, and potential team members who will be available to provide Construction Management Services to Newport-Mesa Unified School District dependent upon the timing of individual project assignments. The following selected individuals are properly certificated, licensed, and experienced in many project types.

Corporate Staffing	Function/Title	Years Experience
Margaret Lundgren	Executive Vice President	30
Gina DeTolve,	Director of Construction Management	23
Marcos Alfaro, CCM	Senior Scheduler	30
Sarah Silva	Contract Administrator	16
Claudenice McCalister, CMIT	Safety Director	20
Potential Project-Specific Personnel	Function/Title	Years Experience
Patrick Lundgren, CCM	Senior Project Manager	22
Andre Haghverdian, PE, CCM, QSP	Senior Project Manager	19
Patrick Tabangcura	Project Manager	30
Claudenice McCalister, CMIT	Project Manager	20
Scott Brontsema	Construction Manager	25
David Cordova	Superintendent	40
Duane Lindgren	Superintendent	38
Cesar Jimenez	Senior Project Engineer	13
Debbie Synnott	Project Engineer	22
Faisal Owais, CMIT	Project Engineer	8
Cathy Cavella	Project Engineer	29

CORPORATE ORGANIZATION STRUCTURE



— Direct Line of Responsibility
- - - Lines of Communication



Margaret Lundgren
Executive Vice President

Education

Business Administration – Oklahoma State University

Relevant Experience

El Camino Community College District

Santa Clarita Community College District

Burbank Unified School District

Santa Barbara City College

Bakersfield City School District

Glendale Community College District

William S. Hart Union High School District

*Las Virgenes Unified School District,
Calabasas, CA*

Oxnard Union High School District

Fullerton Joint Union High School District

Richland School District, Shafter, CA

La Cañada Unified School District

Moorpark Unified School District

Ojai Unified School District

Biography

Mrs. Lundgren has over thirty years of management experience in construction. As Executive Vice President, Mrs. Lundgren takes great care to ensure her firm's obligations are met through the performance level and quality that makes Lundgren a known premier construction management firm.

Mrs. Lundgren oversees company operations and corporate administration. Her experience includes oversight of program and project management, preconstruction, construction and close-out as well as experience in contract development, scheduling, cost negotiations, claims mitigation, financial controls and budgeting. She possesses a strong background in contracts and is thoroughly knowledgeable in federal and public contract codes and statutes, including public bid laws, prevailing wage regulations, licensing laws, labor compliance regulations, and bonding and insurance requirements.

Additionally, Mrs. Lundgren has many years of experience in planning and procedures, from which she develops and establishes company standards for corporate policies, systems, continuity, and compliance.

Her claims expertise is in analyzing project performance, which includes analysis of scheduling issues, delay issues, productivity impacts and cost damages.

Mrs. Lundgren is an ardent supporter of continuing education and directs Lundgren's Education and Training Programs.

Registrations and Affiliations

Construction Management Association of America (CMAA), Member since 1999

Coalition for Adequate School Housing (CASH), Member

Construction Management Advisory Committee, College of the Canyons

Construction Management Advisory Committee, Pasadena Community College



Gina DeTolve
Director of Construction Management

Education

Bachelor of Science – Architecture, Southern California Institute of Architecture

Masters of Architecture Coursework, California State Polytechnic University, San Luis Obispo

Relevant Experience

Antelope Valley College

- \$21M New Sage Hall Building
- Pre-Construction Services for Campus Infrastructure; Swing Space; Modular Fieldhouse

Santa Barbara Unified School District

- \$15M Santa Barbara High School Peabody Stadium Renovation – New Grandstand, Track & Field, and Sitework

Santa Barbara City College

- \$13M Humanities Building Renovation
- \$18.2M New Classroom/Admin Building on West Campus

Santa Clarita Community College District

- \$28.5M New University Center
- \$18.7M Laboratory Expansion and Lecture Hall
- \$1M Bonelli Hall Remodel

William S. Hart Union High School District

- \$115M Measure SA High School Site Selection Pre-Construction Services
- Academy of the Canyons

Oxnard Union High School District

- \$42M Modernization Program
CM Multiple Prime – \$51,893,100
 - Adolfo Camarillo High School
 - Rio Mesa High School
 - Hueneme High School
 - Channel Islands High School

Biography

Ms. DeTolve has a breadth of experience including general contracting, architecture, and construction management. She has worked in both public and private construction on a variety of commercial and residential projects. Over the past two decades, Ms. DeTolve has applied her skills developing work-scopes, overseeing contracts and bidding, preparing takeoffs, obtaining subcontractor/materials pricing, and preparing final proposals for various new buildings, remodels/modernizations and tenant improvement projects.

Ms. DeTolve's strongest area of expertise is in project direction. She is very effective interfacing with the owner, architect and contractors – fostering a strong teamwork environment for a project. As Director of Construction Management she oversees all Lundgren project managers and subsequent owner, design team, and contractor relationships to ensure completion of contract and project closeout phases. Her education in architecture gives her an edge in being able to quickly and effectively review designs and in identifying potential problems.

In addition to having strong field knowledge, computer skills and hands-on experience, Ms. DeTolve has a solid financial and office management background. She has been responsible for managing accounts/billing, lien releases, insurance, purchasing and vendor management.

Highlights / Skills

DSA – Has worked on over 15 school projects involving the Division of the State Architect. She excels in project closeout procedures and project document control.

Constructability Review and Value Engineering

Ms. DeTolve is extremely organized and brings her Architectural background to the review process. She has performed these services on over 10 school construction projects in the past 14 years. She aggressively pursues Value Engineering options throughout the bidding and construction phases to give project owners the option for cost savings.



Marcos Alfaro, CCM
Senior Scheduler

Relevant Experience

Bakersfield City School District

- \$43M New Dr. Martin Luther King Jr. Elementary School

Santa Barbara Unified School District

- \$30M Santa Barbara HS Stadium Renovation – New Grandstand, Track & Field, and Sitework

Tehachapi Unified School District

- \$5.8M Jacobsen Middle School Modernization

William S. Hart Union High School District

- \$27M Hart HS Infrastructure Phase 1 & 2, New Classroom Building and Tennis Courts

El Camino Community College District

- \$52M New Arts Complex and New Behavioral & Social Sciences Building

Newhall School District

- \$7.2 Million New Classroom Buildings (2) and Site Work – Project Manager

Glendale Unified School District

- \$32M ORG Funded Projects at Balboa, R.D. White, and Verdugo Woodlands Elementary Schools – Project Manager

City of Fullerton

- \$9M Seismic Retrofit & Historical Renovation – Project Manager

Fullerton Joint Union High School District

- \$26M New La Sierra/La Vista High School – Project Manager

Glendale Community College District

- \$17.9M New Allied Health Building – Project Manager

Biography

Mr. Alfaro has over 30 years of extensive experience in educational facilities and public works construction with a total of 30 years of construction experience. His ability to manage all aspects of a construction project, from bid to project completion provides the expertise needed to provide leadership and knowledge in effective scheduling. As a Project Scheduler, he has worked extensively with Primavera Construction Management Software performing scheduling, cost and resource management services.

Mr. Alfaro was previously a Project Manager for Lundgren at Fullerton Joint Union High School District on La Vista/La Sierra High School Project. Phase 1 consisted of demo of existing site buildings and building a 4 building new high school campus (75,000 SF) next to an operating high school campus. Phase 1 was complete ahead of schedule. Phase 2 consists of demo of an old high school campus and building a new 2 building high school campus next to the new facility. Both Phases of this project utilized the multiple-prime delivery method. Marcos also recently completed the Fox Theatre Seismic Retrofit and Historical Renovation as a CM at Risk project for the City of Fullerton. Prior to these projects he was the CM on Glendale Community College's Allied Health Building.

Mr. Alfaro's extensive experience acting as the Owner's representative and managing projects make him uniquely equipped to coordinate the efficient, time-saving scheduling for any project.

Professional Certification

California Contractor's License, Class C-8 – Structural Concrete
Specialty Concrete & Masonry Inspector

Registrations and Affiliations

CMAA Certified Construction Manager (CCM)



Sarah Silva
Contract Administrator

Education

Bachelor of Science - Interior Design, California State University, Northridge

Relevant Experience

El Camino Community College District

- \$52M New Arts Complex and New Behavioral & Social Sciences Building

Antelope Valley College

- \$21M New Sage Hall Building
- \$16.2M Campus Infrastructure; Swing Space; Modular Fieldhouse
- \$2.1M Fox Field Hangar

Santa Barbara City College

- \$16M New West Campus Center
- \$4.5M Campus-Wide Miscellaneous Projects: Voluntary Seismic Improvements, Campus Center Swing Space, Field Turf Replacement, LRC Rooms, Photography Lab Remodel, Wake Center Cabling Remodel, DAC Lab Remodel

Santa Barbara Unified School District

- \$30M Santa Barbara High School Peabody Stadium Renovation – New Grandstand, Track & Field, and Sitework

William S. Hart Union High School District

- \$27M Hart HS Infrastructure Phase 1 & 2, New Classroom Building and Tennis Courts
- \$120M New Castaic High School and Access Road

Glendale Unified School District

- \$33M ORG Funded Modernization Projects
 - Balboa ES, R.D. White, Verdugo Woodlands Elementary Schools New 2-Story Classroom Buildings & Site Improvements

Newhall School District

- \$40M Five (5)-campus Modernization and new classroom buildings, Newhall ES 2-story classroom building, Peachland ES new classroom wing and various site work

Palmdale School District

- \$3M Paving & Site Improvements

Biography

Mrs. Silva has over sixteen years of professional experience in the construction industry, specializing in pre-construction, estimating, field coordination, and property management. Currently, she coordinates the construction contracts, documents, and bid and award processes for multiple, simultaneous projects at Lundgren.

As the Contracts Administrator, she helps compile the elements of the project manual for each project and reviews the contents and contract provisions for continuity, completeness, conflicts and compliance with procurement regulations. Mrs. Silva assists in coordinating with the Owner's Team to identify, recommend and incorporate contract modifications as necessary and produces final documents and assures that the overall integrity of the documents is maintained.

In addition, Mrs. Silva oversees and assists in conducting the bid and award process for construction projects, including public works projects. She is knowledgeable in public contract codes and statutes, including prevailing wage regulations, licensing laws, labor compliance regulations, and bonding and insurance requirements.

Mrs. Silva stays apprised of school construction related programs and code and regulation changes and regularly attends workshops, seminars and conferences held by public works entities such as Office of Public School Construction (OPSC), Coalition for Adequate School Housing (CASH) and other various legal and school construction related entities. She is knowledgeable in public contract codes and statutes, including prevailing wage regulations, licensing laws, labor compliance regulations, and bonding and insurance requirements.





Patrick Lundgren, CCM
Senior Project Manager

Education

Bachelor of Science – Business Administration,
California State University, Northridge

Recent Relevant Experience

Santa Clarita Community College District

- \$30M New Science & Lecture Building at Canyon Country Campus
- \$5.5M Central Plant at Canyon Country Campus

Wm. S. Hart Union High School District

- \$120M New Castaic High School
- \$26M Arroyo Seco Junior High School
- \$4.2M Wm. S. Hart High School Administration Building
- \$6.3M Sierra Vista Boys & Girls Club

Newhall School District

- \$7.2 Million New Classroom Buildings (2) and Site Work

Palmdale School District

- \$35M David G. Millen Intermediate School New Construction
- District-Wide Master Planning Assessments, Budgeting, and Estimating

Burbank Unified School District

- \$20M Two Athletic Facilities

Hueneme School District

- \$2.2M Waste Line Replacement & Modernization Project

Glendale Unified School District

- \$18M Modernization of Hoover High School

South Pasadena Unified School District

- \$5M Modernization Program
 - Marengo Elementary School
 - Arroya Vista Elementary School
 - Monterey Elementary School

Glendale Community College District

- \$17M New Allied Health Building
- \$15M New Science Center and Planetarium

Biography

Patrick Lundgren has over twenty two years of professional construction experience with Lundgren Management. His duties have included scheduling and coordinating the work of trade contractors, conflict resolution, review and monitoring of contractor pay requests, change orders, certified payroll reports, as well as coordinating submittals, shop drawings, change orders, RFI's and other contract correspondence. At project closeout, he ensures that all data, punch lists and outstanding issues are resolved; along with making certain that all of the proper DSA/OPSC closeout documents are filed.

Mr. Lundgren has experience in all areas of onsite project administration including developing, expediting and tracking Requests for Information documents; reviewing and negotiating change orders; planning and scheduling of trade contractors and interfacing with District personnel. He is proficient in operating construction tracking program software and Primavera Scheduling software. Mr. Lundgren has excellent writing skills and is a superb communicator.

As a Project Manager, Mr. Lundgren efficiently blends his technical strengths in document management with field needs to achieve project goals and objectives.

Professional Certification

- Certified Construction Manager (CCM), Construction Management Association of America, Member





Andre Haghverdian, PE, CCM, QSP
Senior Project Manager

Education

Bachelor of Science – Civil Engineering, Azad University, Iran

Relevant Experience

El Camino Community College District

- \$25M New Arts Complex

William S. Hart Union High School District

- \$126M New Castaic High School & Access Road
- \$27M Hart HS Infrastructure Phase 1 & 2, New Classroom Building and Tennis Courts

Glendale Unified School District

- \$33M ORG Funded Modernization Projects
 - Balboa Elementary School New 2-Story Classroom Building & Site Improvements
 - R.D. White Elementary School New 2-Story Classroom Building & Site Improvements
 - Verdugo Woodlands Elementary School New 2-Story Classroom Building & Site Improvements

Antelope Valley College

- \$350M Measure AV Program and Construction Management for Various Projects

Newhall School District

- \$40M Five (5)-campus Modernization and new classroom buildings, Newhall ES 2-story classroom building, Peachland ES new classroom wing and various site work

Duarte Unified School District

- New Northview Intermediate School Cafeteria

Lycee De Los Angeles

- \$700K Renovation and Seismic Retrofit Program at the LILA School (performed under previous employer)

Newport-Mesa Unified School District

- \$2M New Corona Del Mar High School Theatre Complex (performed under previous employer)

Biography

Mr. Haghverdian has more than nineteen years' experience the construction industry, practicing both in the private and public sectors. Due to his civil & structural engineering background, he has extensive knowledge of public contract code and license board laws, making him a prime candidate to provide quality construction on any project. Mr. Haghverdian is skilled in construction means and methods, with an excellent record of resolving field issues and subsequent claims. In order to ensure cost-effectiveness on all projects, Mr. Haghverdian has quantifiable experience with budgeting and estimating.

Mr. Haghverdian's established ability to deliver multi-phased projects without delays also contributes to his assets as a project manager. He is valued as an excellent communicator amongst peers and team members. Both Mr. Haghverdian's knowledge and his aptitude for multi-tasking and communicating bring strength to any project team. Through his past project experience, Mr. Haghverdian also has gained a complete understanding of state and local government operations and procedures. His technical abilities also lend to his value in the construction industry. Mr. Haghverdian is certified as a Microsoft Project user and Professional AutoCAD user. Considering safety of the utmost importance on any job site, he also has OSHA Certification in Trench and Excavation, as well as, over 120 hours of management and supervisory training.

Professional Certification

- PE, Professional Engineer - Civil Engineering: California Board for Professional Engineers
- CCM: Certified Construction Manager, CMAA
- QSP: Storm Water Practitioner, State Water Resources Control Board

Registrations and Affiliations

- CMAA – Construction Management Association of America, Member
- Contributor to LA County Complete Street Manual



Patrick Tabangcura
Project Manager

Education

Bachelor of Science – Civil Engineering,
Technological Institute of the Philippines
(TIP) Manila

Masters – Business Administration,
University of the City of Manila

Relevant Experience

William S. Hart Union High School District

- \$126M New Castaic High School

Pasadena Unified School District

- \$28.5M New Academic, Laboratory, and Administration Buildings

University of California, Los Angeles

- \$7.5M SOD Oral Care Cancer Research Center
- \$9.4M Telemedicine and Prime Facilities
- \$8.5M Boelter Hall Renovation

ABC School District

- \$8.5M Whitney High School Multi-Media Training Center

Walnut Valley Unified School District

- \$7.5M Diamond Bar High School Aquatic Center & Classroom Building

Los Angeles Unified School District

- \$27.5M New Valley Region Middle School #12 – North Hills
- \$5.5M Foshay Learning Center Auditorium Renovation

City of Burbank

- \$5.5M Verdugo Park Aquatic Facility

City of Alhambra

- \$34.5M Alhambra Civic Center Library

Biography

Mr. Tabangcura has over 30 years experience in the construction industry. Since achieving his Bachelor of Science degree in Civil Engineer and his Masters degree in Business Administration, Mr. Tabangcura has been tasked to assist in the delivery of many varied public works projects. His experience lies within the educational, governmental, medical, and infrastructure sectors. The majority of Mr. Tabangcura's projects have been for public school districts within California as a project engineer and quality assurance/control.

Mr. Tabangcura makes an excellent addition to any team as excellent communicator and negotiator. His proficiency in administration, document control, and problem-solving along with his financial and budgeting knowledge contribute to projects being delivered on-time and on-budget. Mr. Tabangcura also has experience in sustainable building practices and has delivered two LEED certified projects and one LEED Gold project. Mr. Tabangcura's most recently has assisted the management of the largest high school for William S. Hart Union High School.

Professional Training

- OSHA-10 Hour Training Certification
- OSHA-30 Hour Training Certification
- ISO 14000 – Quality Management
- LEED Building Practices
- Construction Manager-in-Training Certification - CMAA

Computer Software

- ProCore Construction Management
- ProCore Manager Safety & Quality
- MS Office
- View Point
- Ebox
- Blue Beam
- Prolog



Claudenice McCalister, CMIT
Project Manager/Safety Director

Education

- Associates of Science – Construction Management, College of the Canyons
- Bachelor of Science – Civil Engineering, University of Pernambuco, Recife, Brazil

Relevant Experience

Burbank Unified School District

- \$10M New 2-Story Modular Building at Walt Disney Elementary School

Antelope Valley College

- \$21M New Sage Hall Building
- \$16.2M Campus Infrastructure; Swing Space; Modular Fieldhouse

Santa Barbara Community College District

- Pre-Construction Services (Constructability Review) for West Campus Modernization & Campus Center
- \$18.2M New Classroom/Admin Building on West Campus

Palmdale School District

- District-Wide Master Planning Assessments
- Multiple Projects: Value Engineering, Estimating, Scheduling, Project Administration

Bakersfield City School District

- New \$44 Million Paul Cato MS & Douglass Fletcher ES Value Engineering, Estimating, Scheduling, Project Close-out

South Pasadena Unified School District

- Summer '13 Campus Renovation and Multi-Campus Fencing Projects Value Engineering, Estimating, Scheduling, Project Close-out

Biography

Claudenice McCalister graduated as a Construction Technician from Technical Federal School in Pernambuco, Brazil in 1995 and as a Civil Engineer in 2001 from the University of Pernambuco. Mrs. McCalister has over 20 years experience performing on-site project management, safety control, cost estimating, cost control, scheduling, value engineering, project closeout, and administration of various construction projects. Her construction experience includes performing these duties for public schools, churches, commercial buildings, multifamily and commercial high-rises. Her attention to details and goal orientation has made her accomplish all tasks involved in the undertaken construction projects in an organized and timely manner. Mrs. McCalister's abilities include also certification of construction companies in the ISO 9001:2008 Quality System, Quality Assurance and Quality Control. Mrs. McCalister also serves as the Corporate Safety Office and is involved in the safety training of Lundgren employees, keeping abreast of all safety regulations & practical solutions, and monitoring job sites for safety compliance.

Some of Claudenice McCalister's clients in Brazil include: Bank of Brasil, Itau Bank S/A, HSBC Bank, American Consulate in Recife, Pesqueira Public School, Arco Verde Public School, Itaiba Public School, Petrolina Public School, IBM Brasil, among others. She is well versed in MS Office, Expedition Contract Manager, and Procore software systems.

Professional Certification

ISO 9001:2008 Quality System, Quality Assurance and Quality Control (Certified ISO Internal Auditor)

Registrations and Affiliations

CMAA – Construction Management Association of America, Member in Training



Scott Brontsema
Construction Manager

Recent Experience

Santa Barbara Unified School District

- \$28.7M Santa Barbara High School Peabody Stadium Renovation – New Grandstand, Track & Field, and Sitework

Santa Barbara City College

- \$18.2M Classroom/Admin Building on West Campus

Conejo Valley Unified School District

- Westlake HS Track & Field Renovation
- Newbury Park HS Track & Field Renovation
- Thousand Oaks HS Track & Field Thousand Oaks HS Roofing Project
- Redwood MS Locker Room Modernization
- 8 Campus Technology Infrastructure Upgrade
- Westlake HS Roofing Project
- Mates Charter School Roofing Project
- 9 Campus Technology Infrastructure Upgrade
- Multi-Site Campus Security Upgrades & SBAC Testing Labs Renovation
- 3 Campus Wireless Access Upgrades
- Sycamore Canyon MS Child Care Building
- New Century Academy & EARTHS Magnet School
- (\$2M) District-Wide Miscellaneous Projects
- Thousand Oaks HS Gym HVAC Upgrades
- Thousand Oaks HS Corridor Project
- Thousand Oaks HS Science Lab Renovation

Biography

Mr. Brontsema has over 25 years of experience in the construction industry as a superintendent, assistant project manager/construction manager, field coordinator, and estimator. His recent educational sector experience features work on the Peabody Stadium Renovation for Santa Barbara Unified School District and Santa Barbara City College's new West Campus Classroom/Administration Building. Mr. Brontsema also has extensive work experience with the Conejo Valley Unified School District as the site Construction Manager on multiple projects. Mr. Brontsema's dedication to project quality and safety make him an asset to any project team.

Mr. Brontsema is highly skilled in site management duties including scheduling and coordination of contractors, subcontractors, tradespersons, material, quality & production control, and contract management. His total management of all field operations includes direct interaction with Owners, Owner's representatives, architects, engineers, and inspectors. Mr. Brontsema is eager to complete projects on-time and on-budget with minimal impact to students and staff. He has also been trained by the US Army Corps of Engineers in Construction Quality for Contractors.

Certificates and Registrations

- US Army Corps of Engineers CQM - Certified Construction Quality Management for Contractors
- OSHA 10-Hour Construction Safety



David Cordova
Superintendent

Relevant Experience

Santa Clarita Community College District

- \$30M New Science & Lecture Building at Canyon Country Campus

Antelope Valley College

- \$5.9M Swing Space
- \$16.9 Campus Infrastructure and Photovoltaic

California State University, Long Beach

- \$3M Long Beach Music Complex
- \$35M Long Beach Carpenter Performing Arts Center

Los Angeles County Department of Public Social Services

- Department Office Building

City of Hope National Medical Center

- \$12M New Ambulatory Care Clinic
- \$3M Pediatric Tenant Development

Kaiser Hospital

- \$20M Structural Remediation for Five Story Hospital with Basement

Biography

David Cordova has nearly 40 years of experience in the Public Works, Commercial, and Residential sectors. He provides supervisory experience dealing with site management duties including scheduling and coordination of contractors, subcontractors, tradespersons, material, quality and production control, and contract management. He most recently is providing construction supervision of two projects at Antelope Valley College including swing space housing and campus infrastructure & photovoltaic installation projects. Mr. Cordova's work ethic is unsurpassed as is his reliability and punctuality.

Mr. Cordova's experience in many sectors provides him the versatility to conform to the needs of any project. He has overseen multiple millions of dollars in projects with several subconsultants simultaneously. Strong communication, OSHA safety training and blue-print reading are amongst his skills. Mr. Cordova's ability to interact seamlessly with the design, construction, and inspection teams ensures a successful project.



Duane Lindgren
Superintendent

Education

B.A. Liberal Arts – University of Minnesota
Computer Technologies – Mt. San Antonio College

Relevant Experience

Antelope Valley College

- \$2.1M Fox Field
- \$15M College Services Center and Various Campus Projects

Los Angeles Unified School District

- District-wide Electrical Upgrades

Glendale Unified School District

- ORG Funded Projects at Balboa, R.D. White, and Verdugo Woodlands Elementary Schools
 - \$9M Balboa Elementary School New 2-Story Classroom Building & Site Improvements
 - \$10.5M R.D. White Elementary School New 2-Story Classroom Building & Site Improvements
 - \$12.5M Verdugo Woodlands Elementary School New 2-Story Classroom Building & Site Improvements

Palmdale School District

- \$35M David G. Millen Intermediate School New Construction

San Jacinto Unified District

- \$21M San Jacinto High School Expansion/Modernization
- \$7M San Jacinto Unified SD Central Kitchen
- \$850K San Jacinto Elementary School Modernization

Hemet Unified School District

- Jacob Weins Elementary School
- Hemet High School Stadium

Palm Springs Unified School District

- \$8M Desert Hot Springs High School Addition

Colton Joint Unified School District

- \$3M Multi-School Modernization

Biography

Mr. Lindgren has over 38 years experience in the construction industry and extensive knowledge of building, supervising personnel, budgeting, and cost estimation. Mr. Lindgren's experience began in the concrete trade and he later moved on to framing, electrical, plumbing, HVAC, roofing, and stucco work.

For the past 17 years Mr. Lindgren has worked extensively as a project superintendent and construction manager on various public works projects. He takes great responsibility in delivering his projects with a strong emphasis on safety and quality. As a superintendent/project engineer, Mr. Lindgren's duties include but are not limited to: scheduling and coordination of contractors, subcontractors, tradespersons, material, quality and production control, contract management, reporting, project tracking, project documentation, and directly interacting with Owners, Owner Representatives, Architects, Engineers, and Inspectors.

Computer Software

- Procore
- Oracle Construction Manager
- Microsoft Office
- BLS
- Prolog





Cesar Jimenez
Senior Project Engineer

Relevant Experience

Antelope Valley College

- \$16.9M Campus Infrastructure
- \$2.4M Marauder Complex
- \$4M Swing Space & Modular Fieldhouse

Santa Clarita Community College District

- \$4M West P.E. Building Remodel
- \$16.2M Campus Infrastructure; Swing Space; Modular Fieldhouse

William S. Hart Union High School District

- \$1.1M Hart High School Portable Classrooms & Modernization

Sulphur Springs School District

- \$1M Mint Canyon Elementary School Portable Classrooms & Modernization

Fillmore Unified School District

- \$2.2M Sierra High School Rehabilitation and Modernization

Camden Development

- \$1.2M Glendale Triangle Live-Work & Retail Space

Biography

Mr. Jimenez has more than thirteen years' experience in the construction industry. He has studied computer science in college and is a Certified AutoCAD drafter. Mr. Jimenez is also currently working toward his certification as a California Building Inspector. He has experience as an Estimator, Project Coordinator, and Project Manager for general contracting companies. This experience garnered him skills in estimating, technical specification review, scheduling, resource management, & blueprint analysis.

At Lundgren, Mr. Jimenez using his diverse experience to provide support as a Project Engineer. His duties include project tracking, documentation control, site coordination, project close-out, and DSA coordination. Mr. Jimenez is currently utilizing his skills on the delivery of the remodel of the West P.E. building at College of the Canyons.

Highlights / Skills

Certified AutoCAD Drafter

Software – ProCore, Bluebeam, Onscreen TakeOff, GDS WinBid Pro

Debbie Synnott

Project Engineer

Education

Associate of Science – Construction Management, College of the Canyons

Recent Experience

Antelope Valley Community College District

- \$2.7M Fox Field Hanger & Technology Improvements
- \$9M Antelope Valley College Marauder Complex
- \$21M New Sage Hall Building
- \$1.3M Intersection J-12 & 30th West Campus Intersection Improvements
- \$12.5M Antelope Valley College Campus Infrastructure

SunPower by Green Convergence

- Various Solar Roofing & Paneling Installation Projects

Biography

Ms. Synnott has 22 years of experience in the construction field. She is experienced in many sectors including education, commercial, and residential building. Ms. Synnott is also especially experienced in the installation of solar services and energy-centric green building technologies. As a Project Engineer at Lundgren, Debbie has proven herself to be an asset during the construction and close-out process, providing vital support services during these phases of our projects. Her personable and engaging manner combined with excellent communication skills helps our team collaborate with all stakeholders. Ms. Synnott is well versed in the permitting process, scheduling, budgeting, document control, DSA certification, quality control, and close-out procedures.

Prior to joining the Lundgren team, Ms. Synnott managed multiple, simultaneous solar projects with more than 30 clients at a time. She has also worked closely in the past with building engineers, architects, inspectors, and county officials. Currently, Ms. Synnott is serving as the Project Engineer for multiple projects with Antelope Valley College.

Certifications

- Construction Management, College of the Canyons
- Solar Energy Technician, College of the Canyons
- Solar Design & Technology – SunPower University
- Green Building & Fenestration – Southern California Edison
- OSHA 30

Education

Bachelor of Science – Civil Engineering,
Jordan University of Science and Technology

Relevant Experience

Antelope Valley Community College District

- \$9M Antelope Valley College Marauder Complex
- \$16.9M Antelope Valley College Campus Infrastructure

Los Angeles Unified School District

- \$4M Audubon Middle School Modernization Projects
- Parthenia Elementary School Modernization
- \$1 Marina Del Rey Middle School Upgrades

Department of Toxic Control

- \$83M Residential Exide Cleanup throughout Southern California

Biography

Mr. Owais has performed as a Project Engineer in a variety of projects for the past eight years. He is deadline driven and detail oriented in his approach to project management. Mr. Owais work in the educational sector as well as with toxic substance control has helped him build a skillset advantageous to any project. He is also experienced in working on multiple projects at once, honing his time-management abilities. Mr. Owais is also eager to advance his knowledge and practical skills as a Construction Manager in Training with CMAA. Beyond his duties as a Project Engineer, Mr. Owais has also had experience with project design projection, budget estimation, site inspection, and safety implementation.

As a current Project Engineer, Mr. Owais is well versed in the operations of construction projects, helping to keep them on track and on budget. His duties include but are not limited to: tracking all RFIs and submittals, daily reporting, processing change orders, documenting correspondence, organizing job walks, and recording weekly meeting minutes. Mr. Owais is currently providing his services on the New Marauder Complex and Campus Infrastructure projects at Antelope Valley College.

Certifications

- CMAA – Construction Management Association of America, Construction Manager-in-Training
- Hazwoper 40
- OSHA 30

Software

- Procore
- Microsoft Office
- AutoCAD
- ETABS
- Revit
- Bluebeam
- Primavera P6



Cathy Cavella
Project Engineer

Education

- Bachelor of Science – Construction Management, Kelsey-Jenney College, San Diego, CA - 2002

Experience

William S. Hart Union High School District

- \$120M New Castaic High School

Tehachapi Unified School District

- \$6M New Modular Classroom Building at Jacobsen Middle School

Newhall School District

- \$7.6M Old Orchard ES New Classroom Building

Simi Valley Unified School District

- \$2.5M Summer Projects - 9 sites

Los Angeles Community College District

- \$10M Renewable Energy Projects
 - East Los Angeles College
 - Mission College
 - Los Angeles Valley College
 - West Los Angeles College

Los Angeles Unified School District

- \$85M Renovation & Construction Projects
 - Birmingham HS High Tech High Part I & II
 - Calahan ES Campus & Library Renovation
 - Henry MS Intrusion Alarm
 - Monroe HS Softball Field Fencing & Old Lathe House Demolition
 - El Camino HS CCTV & Window Blind Replacement
 - Taft HS Exterior Lighting
 - Anatola ES Library Renovation
 - Bassett ES Library Renovation
 - Lemay ES Library Renovation
 - Cohasset Kindergarten Play Structures
 - Gault ES, Lorne ES, Wilbur ES, & Fulton MS Parent Centers
 - Riverside ES Greening Campus
 - Van Nuys MS Auditorium Renovation, Paving, & Industrial Arts Building HVAC
 - Hazeltine ES Library Renovation & Classroom Modernization
 - Olive Vista MS Library Fire Alarm
 - San Fernando HS Modernization

Biography

Ms. Cavella has over 29 years of extensive experience in educational facilities and public works construction. Her ability to assist all aspects of a construction project, from bid to project completion provides optimal support of any construction project. Ms. Cavella has experience working on new construction projects, as well as, modernization/renovations and sustainable building projects. She has been trained in various safety programs, software, green building practices, and project management methods. Ms. Cavella's work ethic, ability to foster a team environment, and attention to detail make highly valued part of any project. She is especially adept at document control and close-out procedures.

Most recently, Ms. Cavella has provided Pre-Construction & Project Engineering services to for the new Castaic High School at William S. Hart Union High School District and Close-out services for the new modular classroom building at Tehachapi Unified School District.

Professional Certification

- Notary Public, State of California
- OSHA-30 Hour Outreach Course Certification
- OSHA-10 Hour Outreach Course Certification

Experience (Continued)

California State University, Northridge

- \$346M Renovation & New Construction Projects
 - New Arts & Design Center
 - Administration Building
 - New Monterey Hall
 - Sierra Hall Modernization
 - Softball Field Renovation
 - Student Services Building Renovation
 - Science Bldgs 1, 2 & 3 Modernization
 - Delmar T. Oviatt Library Wings Replacement
 - New Magnolia Hall
 - New Manzanita Hall
 - New Delmar T. Oviatt Library Grand Stairs
 - New Art Gallery
 - New Jacaranda Hall
 - New Sequoia Hall
 - Sierra Tower Modernization



FIRM EXPERIENCE

Lundgren Management has provided Program Management, Construction Management, Project Management, and Specialty Consulting Services to over 100 public education sector clients for projects nearing \$2 Billion throughout Southern California. Since our inception, nearly 97% of our CM portfolio consists of public school projects/programs dedicated to the K-12 and community college market sector. Our past K-12 project experience encompasses entirely new school campuses, new facilities on established sites, partial campus modernizations, full scale modernizations, campus renovations, site work and landscaping.

Every one of our projects has required that we interface with DSA, State Chancellor's Office and or the SAB, as well as meet the requirements of DTSC, CEQA, and other governmental agencies on state and local funded school projects. Lundgren also has a vast and diverse range of experience on traditional and alternate delivery methods. Our flexibility in the selection of delivery methods based on the project requirements and the client preference, positively contributes to the successful completion of our construction programs. Prior to the start of any project or program, Lundgren's team will study the project's funding sources to assure your District is maximizing their dollars and time; and recommend the most effective delivery method to the client. We have successfully managed construction projects and programs under the following delivery methods: Design – Bid – Build (traditional), Multiple Prime, Design Build, Lease-Leaseback, and CM at Risk.

We take pride in our ability to foster a team environment conducive to the ever-evolving needs of our clients. We feel extremely fortunate that many Owners have been repeat clients. Our dedication to them has also afforded Lundgren the pleasure of being awarded several Construction Management Association of America (CMAA) Southern California Chapter Awards including:

- ▼ 2020 Project Achievement Award – William S. Hart UHSD, Hart HS Infrastructure and New 2-Story Building
- ▼ 2019 Project Achievement Award – Santa Barbara City College, West Campus Center
- ▼ 2018 Project Achievement Award – Antelope Valley College, New Palmdale Center
- ▼ 2017 Project Achievement Award – Newhall School District, Old Orchard ES New Classroom Building
- ▼ 2016 Project Achievement Award – Palmdale School District, New David G. Millen Intermediate School
- ▼ 2015 Project Achievement Award – Santa Barbara City College, Humanities Building Modernization

PROJECT LISTING

Per the request of RFQ #119-21 for Construction Management Services at Newport-Mesa Unified School District, at the end of this section we have provided a spreadsheet of our ten (10) most recent K-12 projects.

PROJECT TEAM EXPERIENCE

Lundgren Management's project team information has been provided in the "Business Profile" section of our qualifications package, as requested in RFQ #119-21, including resumes of our staff and their individual qualifications and subsequent experience.



PUBLIC WORKS REQUIREMENTS

Over Ninety-five percent (95%) of Lundgren Management's project portfolio is Public Works school construction, giving Lundgren Management extensive experience with state and local agencies. Lundgren keeps current on legislation and proposed legislation related to school construction through memberships in trade associations, legislation subscriptions via email, government agency websites/newsletters and legal workshops. In addition to trade associations, we actively stay current with programs, program procedures and the criteria required from government agencies such as:

- Division of the State Architect (DSA)
- Office of Public School Construction (OPSC)
- Department of Toxic Substances Control (DTSC)
- California Department of Education (CDE)
- State Allocation Board (SAB)
- Department of Industrial Relations (DIR)
- California State License Board (CLSB)
- Office of Labor Relations (OLR)
- California Department of Insurance (CDI)
- California Department of Justice (CDOJ)
- Department of Fish and Game
- Army Corps of Engineers
- State Water Resources Control Board

Lundgren has worked comprehensively with the California Department of Education and the Office of Public School Construction on multiple programs and projects for over 34 years. Our knowledge of DSA regulations is comprehensive. We understand a District's desire to have a smooth and successful relationship with the Division of State Architect and we are fully versed on how school District plans will be reviewed and accepted by that department. Lundgren has managed numerous school construction projects, the full spectrum from concept to occupancy. Our extensive knowledge of DSA requirements, OPSC, as well as DTSC and CDE, has been critical components of our projects and their success.

DISTRICT CONTRACTS

Lundgren Management has not held any contracts with Newport-Mesa Unified School District within the last three (3) years.



Experience Ten (10) Recent K-12 Projects

Owner	Reference	Project	Delivery Method	Project Value	Start Date	Completion Date
Bakersfield City School District	Daniel Wastaferro P 661.631.5883 wastaferrod@bcsd.com	New Martin Luther King Jr. Elementary School	CM Multiple-Prime	\$ 43,000,000	Jan-18	In Progress
Burbank Unified School District	Larry Cross P 818.729.5502 larrycross@burbankusd.org	Disney Elementary School New Modular Classroom Building	CM Multiple-Prime	\$ 10,000,000	Mar-20	In Progress
Glendale Unified School District	Dan Holmquist P 818.507.0201 dholmquist@gusd.net	Balboa, RD White, & Verdugo ES New Classroom Buildings - New 2-Story Modular Classroom Buildings	Lease-Leaseback	\$ 33,504,596	Feb-15	Sep-18
Newhall School District	Fred Palmer P 661.291.6700 fpalmer@newhall.k12.ca.us	Newhall Elementary School Auditorium Modernization	CM Multiple-Prime	\$ 3,672,500	Jul-16	Aug-17
		Newhall Elementary School New Modular Classroom Buildings	Lease-Leaseback	\$ 6,420,333	Jan-15	Aug-16
		Peachland Elementary School New Modular Classroom Buildings	CM Multiple-Prime	\$ 9,179,000	Aug-15	Oct-16
Santa Barbara Unified School District	Steve Vizzolini P 805.963.4338 x6238 svizzolini@sbunified.org	Peabody Stadium Grandstand Replacement and Stadium Renovation	CM over GC	\$ 28,764,392	Jan-17	In Progress
Tehachapi Unified School District	Hojat Enterzari P 661.822.2100 hentezari@teh.k12.ca.us	Jacobsen Middle School New Modular Classroom Building	CM Multiple Prime	\$ 5,972,342	Sep-18	Jan-20
William S. Hart Union High School District	Collyn Nielsen 661.259.0033 x268 cnielsen@hartdistrict.org	Hart High School: Phase 1 & 2 Campus Infrastructure; New 2-story Modular Classroom Buildings & Tennis Courts	CM Multiple-Prime	\$ 21,864,906	Feb-17	Jan-20
		New Castaic High School Campus	CM over LLB	\$ 126,478,000	Aug-16	In Progress



PROJECT & COST MANAGEMENT

What sets Lundgren apart from our competition is that we are a full-service Program and Construction Management firm dedicated to our craft with over 34 years of experience in this industry and a culture based on team building. While many of our competitors started off as general contractors, Lundgren has provided owner representation since its inception. We understand how to partner with our clients, project stakeholders, and communities to ensure goals and budget constraints are achieved as demonstrated during each project we have successfully delivered.

TEAMWORK

The Lundgren corporate philosophy is based on forming a Team consisting of the Client and selected Lundgren staff working in conjunction with the architects, sub-consultants, and project consultants. The Lundgren Team will be directly accountable for attaining the prescribed goals of the project. We have managed numerous educational facilities modernization and new construction programs and have delivered projects on time and within budget. Our project team and systems approach has been the key to our success in management of these construction projects.

COMMUNICATION

Communication is the key to any successful project. Having strong communication skills is essential to keeping the District and other team members and project stakeholders informed and it is critical when it comes to communicating the correct information to the appropriate parties. Another major element of communication is the necessity to maintain excellent project documentation. The project manager is responsible for monitoring and tracking the project by utilizing our proven project controls system. All key project documents must be interactive with the overall reporting system, which provides an overview of the project's costs and schedule status. Clear, understandable, and collaborative communication of all aspects of a construction project is imperative for a well-informed team to keep abreast of project developments and to avoid unnecessary delays. Lundgren actively participates in board presentations and in community outreach programs. If the District requires, Lundgren will gladly participate in any school board or community relations presentations.

DESIGN MANAGEMENT

Value Engineering

Lundgren offers value engineering services to ensure that cost-effective approaches to design and overall project quality are incorporated into the final design. Our value engineering process is a four-step process:

- Step 1: Identify potential design alternatives.
- Step 2: Either accept an alternative based on clear advantages from the standard point of Constructability and future operations or proceed to the next step.
- Step 3: Prepare an evaluation of advantages and disadvantages of each alternative, in context of cost or savings involved.
- Step 4: Present the proposal to the owner for final acceptance or rejection.

Lundgren regularly performs a Value Engineering and Constructability Review at 30% stage of design development and again at the 90% stage of construction documents. Outside specialty trade contractors and consultants may be employed, as needed, in addition to our own in-house expertise, to ensure that the most thorough evaluation of the project is completed at this stage in the design process. At 50% Design



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Development the project budget will be evaluated. The process will be similar to the schematic phase, except the estimates will be developed in a more detailed CSI format to identify individual building components. By the end of the Design Development Phase the A/E's team will have developed the design and systems needed to answer all major questions related to how the project will be built. At the conclusion of the Design Development Phase the Lundgren team will organize a series of reviews like the 50% review process including a preliminary review meeting with the District and design team.

Constructability Review

During the Construction Document Phase, the A/E team finalizes, refines and communicates in exact detail how the contractor/ contractors shall construct the project. At this phase, typical details are provided, and non-typical details are developed for the unique conditions of the project. Lundgren will perform a Constructability Review coordination of all building systems and components to minimize construction conflicts and field change orders. Constructability is defined as "the optimum use of construction knowledge and experience in planning, design, procurements and field operations to achieve overall project objectives". The basis of this concept is that experienced construction personnel need to be involved with a project from the earliest stages to ensure their experience can successfully influence the owners, planners, and designers during the design phase. Accurate constructability reviews result in significant paybacks to a project. The intangible benefits are as important as the quantitative benefits which include more accurate schedules, increased productivity, improved sequence of construction, enhanced quality, decreased maintenance, and a safer job.

Our intent is to identify constructability issues that may influence the construction of the project or bidder understanding of the project scope. Understanding the design intent from the kick-off meeting and subsequent site visit, the constructability report will address all elements of the contract documents, their interrelation, and how they relate to the existing site conditions. More specifically:



- ü Cross-check each element of the plans for completeness - from the overall construction plan and phasing to individual details and schedules.
- ü Drawings from various disciplines will be scrutinized and then coordinated with one another.
- ü The specifications will be reviewed and coordinated with the plan documents to minimize unforeseen conflicts and/or questions that may arise in the construction phase, potentially eliminating delays and excess cost.
- ü Review the structures from foundation to the roof to ensure that construction sequencing and detailing conforms to standard construction practices.
- ü Review plans/specifications to identify options for use of more cost-effective alternative materials (value engineering) or design details including recommendations when the proposed specifications are likely to limit competition or cause excessive delays in delivery.
- ü Each trade's work is examined with regards to typical change orders during construction. Clarification of issues prior to bid can reduce bidder's question, increase the likelihood of competitive bids and reduce RFI's during the construction process.
- ü Architectural and structural drawing review includes comparison of architectural to structural details to identify structural conflicts within the building envelope, ceiling heights and stairways.



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- ü The mechanical/electrical/plumbing drawing review includes the review of ductwork, attachments, conflicts between electrical and mechanical components within ceilings and coordination of fire alarm device locations with requirements such as elevators, smoke dampers and fire doors/partitions.
- ü Identify potential design alternatives related to plumbing, HVAC and electrical. Prepare an evaluation of advantages or disadvantages of each alternative in context of cost or operational savings.
- ü Review District's standards and compare these standards to specified items in the Contract Documents.

Concurrent with constructability review, Lundgren will work closely with the Architect and Newport-Mesa Unified School District to prepare bid documents. Throughout the bid process, we will act as the focal point for request for information correspondence, ensuring that all questions are responded to in a timely manner, adding input to the process, to create a clear and accurate picture of contractor requirements.

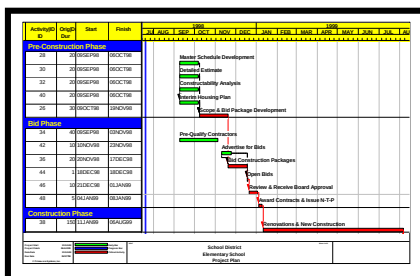
We pride ourselves in our ability to generate bidder interest and put a great deal of effort in communicating with contractors prior to the bid openings. We will ensure the project is advertised in a manner that is advantageous to both the project and the District, meeting all public bidding requirements, and taking advantage of time and availability of labor and materials.

SCHEDULING

In over 34 years of successfully planning, scheduling, and executing construction programs, Lundgren has developed a consistent and standardized planning, scheduling and progress assessment program. Whether in the design or construction phases, our Scheduling program is a detailed procedure which includes our philosophy, policies, and specification requirements to manage the project schedule. Our personnel are thoroughly trained in these processes and are instrumental in leading the team to bring our projects in, on or ahead of schedule. We use CPM schedule formats for our primary documents for control, reporting, schedule change order management, deficiency notification and claims mitigation on all our projects.

Our approach to planning and scheduling includes consistency of data as well as establishment of the parameters for each program and project. In addition, there is always a document trail that depicts what has driven the scheduling, restraints, logic and timing. This is important not only for control and reporting but also for claims mitigation and analysis, should a situation occur which requires evaluation of the history and impacts to the project. Along with the development and maintenance of schedules, our Project Manager will generate a complete schedule analysis and forecast to allow for making the most efficient project decisions.

Lundgren's Project Manager will produce detailed CPM schedules analysis, review issues and impacts to the schedule, evaluate "what if" schedule changes and prepare written notifications to organizations that are impacting the project schedule and explain why those impacts are affecting the project. Key schedule components include:



- Preparation of Logic/Network Diagrams
- Cost and Resource Loading/Leveling
- Cash Flow Analysis
- Progress Monitoring & Updating
- Work Breakdown Analysis
- CPM Schedule Review



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COST MANAGEMENT

Estimating & Budgeting

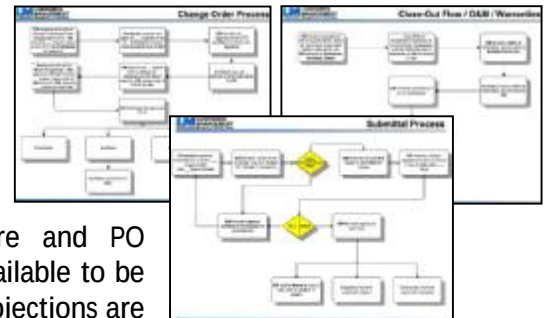
Every Public-School District is faced with challenging budget issues on projects. We understand the importance of cost containment and our role to contain project cost throughout the bidding and construction process. Whether we are estimating a project or task, evaluating a progress billing or reviewing a change orders we are always recommending best value to the District.

In the preparation of cost estimates, our cost estimating data is based on real projects and real bid costs, and our record for estimating accuracy is second to none. This expertise gives us the ability to estimate accurately especially during bidding phases and throughout construction to fairly evaluate bidding. We identify areas where substantial dollars may be wasted, and where opportunities exist to optimize performance. These are matters of approach and process. Substantial additional costs can be avoided through proper attention to such issues as:

- Clearly defining objectives before asking the Architect to proceed with drawings or changes
- Allowing adequate bid time (rushed bidders compensate by adding contingency dollars)
- Quality cost estimating
- Clear communications with site personnel at the campus to avoid late changes
- Getting maximum scope of work into the base bid; i.e. avoiding the higher pricing structure of addenda or change orders for significant elements of work

Cost Control

On each of our Projects we have developed hard cost and soft cost categories that are tailored to the project needs. Our first task is to review the financial systems in place at the District so that we can best determine how to integrate the budgeting module into the reporting structure. All funding revenue sources are incorporated into the Master Budget so that optimum fund availability is identified. We will then assess expenditure and PO commitments made to date to determine balance of funding available to be budgeted. Funding, Expenditures, Commitments and Balance Projections are then updated monthly and reported to Newport-Mesa Unified School District. Project budgets must be developed based on strong historical data and experience. We ensure adequate contingencies are built in for both soft costs and hard costs so that as budgets are further refined contingencies are reduced and the overall budget is preserved.



Scope creep is easier to control on New Construction projects than it is on Modernization projects due to the nature of unforeseen conditions in existing facilities and their impact to the surrounding area not previously contemplated as part of the scope of work. To help mitigate impact to the budget we factor higher contingencies for Modernization projects. Additionally, we recommend upfront surveys to uncover as much concealed information as possible. For Modernization projects we will ensure all appropriate user groups, and facilities personnel have reviewed the plans and clearly understand what will be constructed. Phased reviews at each stage of the project development are critical to obtain buy-in and consensus of the project moving forward. Initial cost estimates include higher design contingencies which are then reduced with each subsequent phased submittal to manage the project scope within budget parameters thereby mitigating schedule impacts during construction and avoiding “so-called value engineering” after the fact which generally compromises project quality.



QUALIFICATIONS FOR CONSTRUCTION MANAGEMENT SERVICES (RFQ#119-21) NEWPORT-MESA UNIFIED SCHOOL DISTRICT

Change Order Management

If we have done our job properly in the design phase by clearly presenting the project to its stakeholders and obtaining appropriate approvals, there should be minimal Change Orders caused by the Owner, unless by clear directive from an authorized representative. Also, during the Design phase we perform phased constructability reviews to reduce conflicts in the drawings caused by poor coordination between engineering disciplines and code compliance ambiguities. This has proven to reduce errors and omissions on all projects we have managed. Our track record of change orders caused by errors and omissions when we have performed constructability reviews averages 1% - 2%; well within industry standard. One of our most recently completed projects, for the Santa Barbara City College, resulted in an astonishing change order percentage of only 0.45% and was presented a 2019 Project Achievement Award by the Construction Management Association of America (CMAA) Southern CA Chapter. To minimize change orders due to unforeseen conditions we recommend utility surveys and destructive testing of suspect areas in addition to providing complete as-built documentation to the design team. During construction, we track all change order costs and identify cause to hold the appropriate parties accountable and have a record of completing modernization projects within an average of 5% change order reserve.

Potential change orders are mitigated in the field our project team who respond to RFI's within hours of receiving them and forwarding them to the Architect on the same day in which they are received. Daily, Lundgren's designated field personnel orchestrate the necessary information needed to resolve issues and answer questions that arise on the project site in order to achieve speedy and accurate resolutions. As a change order becomes evident; Lundgren's staff will discuss, with the Owner, the nature of the potential change order and receive the Owner's approval for the change order request.

PHASE MANAGEMENT

Pre-Construction & Bid/Award

One of the first things our team will do is conduct a site evaluation. It is our intent to make recommendations and offer suggestions to aid each project stakeholder. The main reason for this walk is to identify any site-based concerns to minimize unforeseen conditions. Concurrent with these activities, Lundgren would attend any established design team meetings to offer feedback pertaining to scope budget and schedule. We would also discuss Construction planning items, such as: phases, staging of construction, staging areas, temporary fencing, and lay down areas.

Lundgren has a dedicated contracts department that focuses, solely, on bidding projects. We have seen this work very positively for our clients, regarding compliance with the always evolving bid laws and climate. This also helps create a very competitive bid process and constant attention is paid to contractor notification and follow-up Lundgren Management will work closely with the District legal counsel and project design team to prepare bid documents. Throughout the bid process, we will act as the focal point for preparing the Notice to bidders, request for information correspondence, ensuring that all questions are responded to in a timely manner, adding input to the process, to create a clear and accurate picture of contractor requirements. It will be our responsibility to develop bid packages that are clear, concise, and attractive to potential bidders.

Our firm will ensure the project is advertised in a manner that is advantageous to both the project and the District, meeting all public bidding requirements, and taking advantage of time and availability of labor and materials. We will also pre-qualify all contractors, key subcontractors, material suppliers, surveyors, testing laboratories and specialty consultants for campus projects. We will conduct pre-bid conferences to ensure that all bidders understand compliance issues as well as the documents they are bidding. Bid dates will be



QUALIFICATIONS FOR CONSTRUCTION MANAGEMENT SERVICES (RFQ#119-21) NEWPORT-MESA UNIFIED SCHOOL DISTRICT

carefully scheduled to take advantage of the bidding environment and to limit competition with other projects bidding at the same time.

Lundgren Management has a database of over 2,400 contractors that have worked on DSA school construction projects. Based on our success we have a large following of qualified trade contractors that are interested in bidding on your projects. In addition, we welcome all new and qualified contractors to bid on your projects. During the bid phase, we strongly promote local bidder interest to ensure the District will get the highest quality and lowest responsible and responsive contractor, with an emphasis on notifying as many local contractors as possible.

Document Control

Our document control procedures include the management of correspondence amongst all project stakeholders. Lundgren's document control procedure ensures that time-sensitive documents move quickly and that issues are resolved before delays become a factor. Proper document control is essential to the success of any construction program. Our interest and efforts involve great concern for effective processing of requests and recommendations of approval, denial, or modification, to avoid delay to the work.

Lundgren uses the project tracking software(s) Pro-Core and Bluebeam to ensure that the project runs efficiently through communication and document control. Organization and the flow of information on a construction project are essential to a project's success. These programs will provide project controls throughout all phases of the project from pre-construction to project close-out. They provide in-depth project management data from daily reports, transmittals, and RFI's to cost information, design management, and tracking features. Perhaps the biggest benefit to utilizing this software is that the information will be shared throughout construction and beyond and fully accessible by the District.

Construction

During the Construction, we recognize that there are many variables controlling the process. We attempt to control these variables by constant vigilance and with a thorough understanding of the goals and objectives of the Owner. We are pro-active in our approach to administering construction issues and act as the catalyst in the process. All business is conducted in a climate of collaboration between parties, including the trade contractors. We draw contractors into a team concept by avoiding the typical "Us" vs. "Them" approach to the work. Our goal is to develop an environment where contractors participate collaboratively in solving problems and in working together to achieve a successful project.

The review and approval process for project submittals and shop drawings is almost always an extremely important. The Lundgren team will establish a master list of submittals prior to start of the construction phase and will track any long lead item to assure timely delivery and installation. Years of working on educational facilities has provided us with vast range of experience to understand the criteria of working on an active campus. In this regard our site team will develop and track the followings to assure the success of the project. All of these items will be diligently coordinated with the campus schedule and will be considered on the construction activities durations and schedules:

- Existing Facilities Needs & Maintenance
- Site Access & Site Safety Plans
- Facilities working hours and schedule
- Environmental Needs
- Working Hours/Out of our works/Weekend Works
- Deliveries and haul off plan



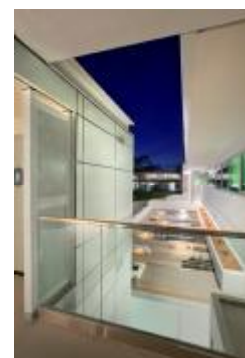


QUALIFICATIONS FOR CONSTRUCTION MANAGEMENT SERVICES (RFQ#119-21) NEWPORT-MESA UNIFIED SCHOOL DISTRICT

Our project team will conduct weekly project progress meetings with the District, architect & subcontractors to discuss project safety, project schedule, unanswered Requests for Information (RFIs), project issues, and the state of cost proposals. We maintain up-to-date project specifications, drawings, and RFI responses and changes. All cost proposals (PCO's), RFI's, Change Estimate Requests, Change Orders, and Information Bulletins are entered into one of our web-based construction administrative software's, and monitored for overdue responses.

Close-Out

As construction nears completion, Lundgren will coordinate the move-in schedule with Newport-Mesa Unified School District Administration and site staff. We will ensure that all necessary DSA reports are completed and turned over to the Architect for DSA submission and approval. Project Operation and Maintenance Manuals will be compiled, inclusive of guarantee and warranty information. Punch lists will be proactively prepared in a team environment with Lundgren, the Architect and the District's Facility Staff so that any punch list work does not interfere or preclude scheduled occupancy by the site staff. If necessary, Lundgren will work diligently to accommodate needs of early occupancy. Upon project completion, project start-up, training and maintenance procedures will be established and implemented to enable District personnel to operate their facilities in a smooth and orderly fashion.



HOURLY RATES & FEES

Lundgren Management's hourly labor will be charged based on actual time spent by an employee at the rate for their position as noted in the table below. Lundgren Management is open to negotiation of these rates with Newport-Mesa Unified School District upon selection for Construction Management Services. Lundgren Management's schedule of fees can be provided upon request once individual project parameters have been defined.

Position	Hourly Rate
President	\$ 175
Executive Vice President	\$ 175
Director of Construction Management	\$ 160
Senior Project Manager	\$ 150
Project Manager	\$ 135
Construction Manager/Superintendent	\$ 130
Assistant Project Manager	\$ 120
Project Engineer	\$ 100
Project Administrator	\$ 85
Estimator	\$ 140
Scheduler	\$ 130
Contract Administrator	\$ 110
Corporate Office Administrative Support	\$ 65

Please note that dependent upon the duration of the scope of work within RFQ #119-21, minor escalation rates may apply and may be subject to negotiation in the future.



GENERAL CONDITIONS & PROJECT REIMBURSABLE COSTS

General Conditions and reimbursable expenses are generic support activities which are necessary to support all construction aspects of a project. General Conditions are typically estimated to be between 5% and 10% of construction cost and Lundgren is open to negotiation with the District upon selection for Construction Management Services. *The following Typical Reimbursable Items & Services is not all-inclusive. Incurred expenses are billed at their actual cost and only if deemed necessary to support the task or project.*

TEMPORARY FACILITIES

- Project Office – Trailer
- Project Office – Equip/Maintenance
- Temporary Phone – Cell/Landline
- Temporary High-Speed Internet
- Office Supplies
- Temporary Toilets
- Office Janitorial
- Technology Setup/Maintenance (lump sum)

TEMPORARY UTILITIES

- Temporary Water
- Temporary Power
- Temporary Sewer

JOBSITE SECURITY/SAFETY

- Temporary Barricades & Fencing
- Signage
- Safety Inspections
- Safety Equipment/Supplies

CLEAN UP

- Trash Service/Dumpsters
- Jobsite Cleanup
- Final Building Cleanup

MISCELLANEOUS

- Document Control Software (lump sum)
- Bid Advertising
- As-builts
- Postage/Delivery
- Storage
- Bid Advertising



SUB CONSULTANTS

Lundgren Management currently utilizes the sub-consulting services of a local estimating firm for estimating services on our projects. This firm was established in 2007, working with Lundgren since its inception, and has been dedicated solely to estimating. They provide services to construction managers, designers, and developers. This firm works with Lundgren staff to develop our project estimates for our clients. Their estimating methods have consistently produced quality product tailored to our clients. By performing multiple estimates during the various design phases, our estimator can minimize unpredictable cost overrun and make any necessary corrections to bring the project back under budget.

WM2S, Inc.
Walid Shihayed
Santa Clarita, CA. 91387
P. 661-367-5242



REFERENCES

William S. Hart Union High School District
Collyn Nielsen, Chief Administration Officer
P. 661-259-0033 x268
cnielsen@hartdistrict.org

Projects: • \$129M New Castaic High School
• \$27M Hart High School Site Infrastructure, New (2-Story) Classroom Buildings & Tennis Courts
• CTE Projects

Bakersfield City School District
Daniel Wastafarro, Assistant Director, Building Operations
P. 661-631-5883
wastafarro@bcsd.com

Projects: • \$43M Martin Luther King Jr. Elementary School
• \$45.8M New Douglas K. Fletcher Elementary School & Paul L. Cato Middle School

Santa Barbara Unified School District
Steve Vizzolini, Director of Facilities and Modernization
P. 805-963-4338 x6238
svizzolini@sbunified.org
Projects: • \$30M Santa Barbara High School - Peabody Stadium Renovation

Newhall School District
Fred Palmer, Director of Facilities, Maintenance, and Operations
P. 661-291-6700
fpalmer@newhall.k12.ca.us
Projects: • Master Planning Services
• \$11.5M Newhall Elementary School New Classroom Building & Auditorium Modernization
• \$1.7M Meadows Elementary School New Classroom Buildings
• \$7.5M Peachland Elementary School New Classroom Buildings
• \$6.7M Old Orchard Elementary School New Classroom Buildings
• \$2M Valencia Valley Elementary School New Classroom Buildings
• \$254K Interim Housing at Valencia Valley Elementary School
• \$318K New Restroom Building & Site Grading at Stevenson Ranch Elementary School

Burbank Unified School District
Larry Cross, Director of Facilities
P. 818-729-5502
larrycross@burbankusd.org
Projects: • \$10M Walt Disney Elementary School New Classroom Building
• \$9.5M John Burroughs High School Memorial Field Renovation
• \$8.6M Burbank High School Athletic Track & Field Renovation



Since 1987, Lundgren has managed a substantial amount of construction projects and overseen the work of thousands of General Contractors, Sub-contractors and Multi-Prime trade contractors while retaining an excellent legal track record. We hereby declare:

- there is no pending legal action against our firm, nor any employee of our firm, alleging violations of the law in connection with an offering of municipal securities in a California transaction.
- there have not been any settlements or judgements involving such actions within the last five (5) years against our firm, nor any employee of our firm.
- we do not have any judgement, settlement, or arbitration awards valued at \$5,000 or greater relating to a civil action judgement, settlement, arbitration award, or administrative action to be reported for our firm.

ATTACHMENT B

CERTIFICATION – REQUEST FOR QUALIFICATIONS

I certify that I have read and received a complete set of documents regarding the attached **Request for Qualifications (RFQ) # 119-21 – CONSTRUCTION MANAGEMENT SERVICES** and the instructions for submitting an RFQ. I further certify that I must submit three (3) proposal copies, plus a complete copy on flash drive, of the firm's Proposal in response to this request and that I am authorized to commit the firm to the proposal submitted.

Margaret Lundgren

Signature

Executive Vice President

Title

26330 Citrus Street

Address

(661) 257-1805

Telephone

2/19/21

Date

Margaret Lundgren

Typed or Printed Name

Lundgren Management Corp.

Company

Valencia, CA 91355

Address

(661) 257-1806

Fax

If you are bidding as a corporation,
please provide your corporate seal
here:

ATTACHMENT C

STATEMENT OF EXPERIENCE AND FINANCIAL CONDITION

Company Name: Lundgren Management Corporation

(Check One): ☒ Corporation ☐ Partnership ☐ Sole Proprietorship

Address: 26330 Citrus Street, Valencia, CA 91355

Telephone/FAX#: (661) 257-1805 / (661) 257-1806

Date and State of Formation/Incorporation: December, 1987 CA / 3-19-2001 CA

Is the company authorized to do business in California? Yes

Basis of Authorization: ☒ California Corporation ☒ California Business License
☐ California Engineering License ☐ Other (specify)

Identify the California office to be used for this contract if organization is located/headquartered outside of California:

Address: N/A

FINANCIAL INFORMATION

State the company's California and total revenues for 2017, 2018, 2019:

	<u>2017</u>	<u>2018</u>	<u>2019</u>
California:	<u>\$15,148,828</u>	<u>\$6,596,252</u>	<u>\$6,028,106</u>
Total:	<u>\$15,148,828</u>	<u>\$6,596,252</u>	<u>\$6,028,106</u>

Identify the largest project, in dollars, which your company has initiated or completed within the past five (5) years:

Castaic High School (William S. Hart Union High School District)
\$129,000,000.00

ATTACHMENT D

ANSWER THE FOLLOWING QUESTIONS

1. Is the company or its owners connected with other companies as a subsidiary, parent, affiliate, or holding company? ☒ Yes ☐ No If yes, explain on a separate, signed sheet.
2. Does the company have an ongoing relationship or affiliation with an equipment manufacturer? ☐ Yes ☒ No If yes, explain on a separate, signed sheet.
3. Has the company (or any owner) ever defaulted on a contract forcing a surety to suffer a loss? ☐ Yes ☒ No If yes, explain on a separate, signed sheet.
4. In the past five (5) years, has the company had any project with disputed amounts more than \$50,000 or a project which was terminated by the owner, owner's representative or other contracting party and which required completion by another party? ☐ Yes ☒ No
If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, date and reason for termination/dispute.
5. Has the company, an affiliate company, or any owner ever declared bankruptcy or been in receivership? ☐ Yes ☒ No If yes, explain on a separate, signed sheet.
6. Has the company ever had an arbitration on contracts in the past five (5) years? ☐ Yes ☒ No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, contract value, disputed amount, a brief description and final resolution.
7. Does the company have any outstanding liens or stop notices for labor and/or materials filed against any contracts which have been done or are being done by the company? ☐ Yes ☒ No If yes, explain on a separate, signed sheet. State the project name, location, owner/contact person, telephone number, amount of dispute, and brief description of the situation.

THE UNDERSIGNED DECLARES UNDER PENALTY OF PERJURY THAT ALL OF THE INFORMATION SUBMITTED WITH THIS PROPOSAL IS TRUE AND CORRECT.

SIGNATURE:

NAME:

TITLE:

Margaret Lundgren
Margaret Lundgren
Executive Vice President

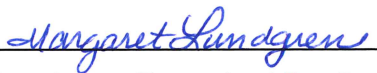


ATTACHMENT D
QUESTION 1

1. Is the company or its owners connected with other companies as a subsidiary, parent, affiliate, or holding company? If yes, explain on a separate, signed sheet.

Answer: YES

Lundgren Builders, Inc. is a subsidiary of Lundgren Management to perform general building (Lease-leaseback, CM @ Risk or Design Build) as part of Lundgren Management.



Margaret Lundgren, Executive Vice President

ATTACHMENT E

PROJECT REFERENCE FORM

Provide information for the past five (5) years for contracts that your firm has completed, or has in progress, which most closely represents the services requested in this RFQ. Provide the following information:

1. Project title and location
2. Name, address, and phone number of contact person
3. Nature of firm's responsibility
4. Type of contract (performance, direct cost, etc.)
5. Contract amounts
6. Start Date
7. Current status

For one of the above projects, provide a cost breakdown of the following project components: technical analysis, design and implementation, project management, monitoring, training, educational programs, maintenance (if any), and budgeting.



Project References Past 5 Years

K-12

Owner	Reference	Project	Location	Delivery Method	Project Value	Start Date	Completion Date
Bakersfield City School District	Daniel Wastaferrro P 661.631.5883 wastaferrro@bcsd.com	New Martin Luther King Jr. Elementary School	Bakersfield	CM Multiple-Prime	\$ 43,000,000	Jan-18	In Progress
		Douglas K. Fletcher ES & Paul L. Cato MS New Construction	Bakersfield	CM Multiple-Prime	\$ 45,892,062	Jun-12	Jan-14
Burbank Unified School District	Larry Cross P 818.729.5502 larrycross@burbankusd.org	Disney Elementary School New Classroom Building	Burbank	CM Multiple-Prime	\$ 10,000,000	Mar-20	In Progress
Glendale Unified School District	Dan Holmquist P 818.507.0201 dholmquist@gusd.net	Balboa, RD White, & Verdugo ES New Classroom Buildings - New 2-Story Modular Classroom Buildings	Glendale	Lease-Leaseback	\$ 33,504,596	Feb-15	Sep-18
Los Angeles County Office of Education	Josue Espino P 562.940.1787 espino_josue@laoe.edu	Modular Classroom Replacement at Multiple Head-Start Sites	Los Angeles	Owner Representative	\$ 2,000,000	Mar-18	Jan-19
Newhall School District	Fred Palmer P 661.291.6700 fpalmer@newhall.k12.ca.us	Newhall Elementary School Auditorium Modernization	Newhall	CM Multiple-Prime	\$ 3,672,500	Jul-16	Aug-17
		Newhall Elementary School New Classroom Buildings	Newhall	Lease-Leaseback	\$ 6,420,333	Jan-15	Aug-16
		Peachland Elementary School New Classroom Buildings	Valencia	CM Multiple-Prime	\$ 9,179,000	Aug-15	Oct-16
		Old Orchard Elementary School New Classroom Buildings	Valencia	CM Multiple-Prime	\$ 7,659,095	Sep-15	Aug-16
Palmdale School District	Al Tsai P 661.810.2365 ATsai@palmdalesd.org	Portables, Restrooms, & Site Infrastructure at Juniper Intermediate School	Palmdale	CM Multiple-Prime	\$ 328,138	May-16	Dec-16
St. Anne's / LACOE	Deborah Paratore P 213.38.2931 dparatore@stannes.org	Early Headstart Facilities at Two Elementary Sites	Lynwood	CM over GC	\$ 5,086,690	May-20	In Progress
Santa Barbara Unified School District	Steve Vizzolini P 805.963.4338 x6238 svizzolini@sbunified.org	Peabody Stadium Grandstand Replacement and Stadium Renovation	Santa Barbara	CM over GC	\$ 28,764,392	Jan-17	In Progress
Simi Valley Unified School District	Ron Todo P 805.306.4500 x4011 ron.todo@simivalleyusd.org	Staff Augmentation for Miscellaneous Bond Projects	Santa Clarita	Design, Bid, Build	\$ 4,500,000	Jun-15	Feb-19
Tehachapi Unified School District	Melissa Kielpinski P 661.822.2100 mkielpinski@teh.k12.ca.us	Jacobsen Middle School New Classroom Building	Tehachapi	CM Multiple Prime	\$ 5,972,342	Sep-18	Jan-20
William S. Hart Union High School District	Collyn Nielsen 661.259.0033 x268 cnielsen@hartdistrict.org	New Castaic High School - Pre-construction & Construction Management Services	Castaic	Agency CM over Lease-Leaseback	\$ 126,478,000	Jan-17	In Progress
		Hart High School: Phase 1 & 2 Campus Infrastructure; New 2-story Modular Classroom Buildings & Tennis Courts	Newhall	CM Multiple-Prime	\$ 21,864,906	Feb-17	In Progress



Project References Past 5 Years

HIGHER EDUCATION

Owner	Reference	Project	Location	Delivery Method	Project Value	Start Date	Completion Date
Antelope Valley Community College District	Doug Jensen P 661.722.6470 djensen@avc.edu	College Services Center (Palmdale Center)	Palmdale	CM Multiple-Prime	\$ 15,565,170	Sep-15	Nov-17
		Swing Space - Phase 1 & 2 (+ Modular Buildings - \$1,723,143)	Lancaster	CM over GC	\$ 4,184,000	Feb-17	In Progress
		Marauder Complex	Lancaster	CM over GC	\$ 9,000,000	Sep-19	In Progress
		Campus Infrastructure	Lancaster	CM Multiple-Prime	\$ 12,500,000	Jun-19	In Progress
		AT&T Cell Tower Project	Lancaster	Owner's Representative	\$ 1,900,000	Aug-19	In Progress
		Fox Field	Lancaster	CM Multiple-Prime	\$ 2,100,000	Jul-19	In Progress
College of the Canyons (Santa Clarita Community College District)	Jim Schrage P 661.259.7800 x3222 Jim.Schrage@canyons.com	Canyon Country Campus - New Science Building Pre-Con Services and Construction Management	Canyon Country	CM Multiple-Prime	\$ 30,552,665	Sep-15	In Progress
		Canyon Country Campus - Central Plant: Pre-Con Services and Construction Management	Canyon Country	CM Multiple-Prime	\$ 5,653,966	Sep-15	In Progress
		West PE Remodel	Valencia	CM Multiple-Prime	\$ 4,148,720	Feb-19	Sep-20
El Camino Community College District	Michael Pascual P 310.660.3593 x3374 mopascual@elcamino.edu	New Arts Complex & New Behavioral and Social Sciences Building	Castaic	Agency CM over Lease-Leaseback	\$ 52,090,000	Aug-20	In Progress
Santa Barbara City College	Rob Morales P 805.965.0851 Moralesr@sbcc.edu	PE Building Replacement	Santa Barbara	CM Multiple-Prime	\$ 45,000,000	Feb-20	In Progress
		Miscellaneous Projects: Campus Center Voluntary Seismic Improvement, Existing Classroom Renovation, DAC Lab Remodel, Childrens Center, Department Moves & Radiology Equipment	Santa Barbara	CM Multiple-Prime	\$ 4,500,000	Mar-17	In Progress
		West Campus New Classroom/Admin Building	Santa Barbara	CM Multiple-Prime	\$ 18,200,000	Sep-14	Jan-18

Services Offered

CM Multiple-Prime - Pre-Construction and Construction Management Services

CM over GC - Pre-Construction and Construction Management Services

Lease-Leaseback - Pre-Construction & Lease-Leaseback Services

Agency CM - Construction Management Services

ATTACHMENT F

NEWPORT MESA UNIFIED SCHOOL DISTRICT

REQUEST FOR PROPOSALS AND STATEMENT OF QUALIFICATIONS FOR CONSTRUCTION MANAGEMENT SERVICES

STATEMENT OF NON-CONFLICT OF INTEREST

The undersigned, on behalf of the consulting firm set forth below (the "Consultant"), does hereby certify and warrant that, if selected, the Consultant while performing the consulting services required by the Request for Qualification, shall do so as an independent contractor and not as an officer, agent or employee of the Newport Mesa Unified School District ("the District"). The undersigned further certifies and warrants that: (1) no officer or agent of the Consultant has been an employee, officer or agent of the District within the past two (2) years; (2) the Consultant has not been a source of income to pay any employee or officer of the District within the past twelve (12) months; (3) no officer, employee or agent of the District has exercised any executive, supervisory or other similar functions in connection with the Consultant Agreement or shall become directly or indirectly interested financially in the Consultant Agreement; and (4) the Consultant shall receive no compensation and shall repay the District for any compensation received by the Consultant under the Consultant Agreement should the Consultant aid, abet or knowingly participate in violation of this statement.

Signature	<u>Margaret Lundgren</u>
Printed Name	<u>Margaret Lundgren</u>
Title	<u>Executive Vice President</u>
Date	<u>2/19/21</u>

ATTACHMENT G

FIRM PROPOSAL / OFFER FORM

This Proposal/Offer Form must be duly executed and submitted with any proposal/offer to NMUSD.

The Offeror hereby agrees that its proposal/offer is subject to all RFQ # 114-21 provisions, terms and conditions, attachments, exhibits, amendments and other applicable materials which are attached or incorporated by reference. Offeror hereby agrees to promptly enter into an agreement in substantial accordance with such RFQ provisions, terms and conditions, and secure a performance bond within five (5) days of the Districts intent to award the contract.

The Offeror hereby agrees that its attached proposal/offer of which this is part, is a firm and irrevocable offer and valid for acceptance by NMUSD for the period sixty (60) days after closing. The Offeror hereby agrees that if its proposal/offer is accepted by SAUSD that it shall provide all of the services in accordance with the RFQ, as it may be amended.

Name of Person Duly Authorized to Execute this Proposal/Offer: Margaret Lundgren

Duly Authorized Signature: 

Title: Executive Vice President

Date of this Proposal/Offer: 2/22/21

Offeror Name: Lundgren Management Corporation

Offeror Address: 26330 Citrus Street, Valencia, CA 91355

Offeror Telephone: (661) 257-1805

Offeror Email: margaret.lundgren@lundgren.net

ATTACHMENT H

NEWPORT MESA UNIFIED
SCHOOL DISTRICT
2985 Bear St., Bldg. A
Costa Mesa, California 92626
(714) 424-5063

**Construction Management Services
RFQ: # 119-21**

**NONCOLLUSION
DECLARATION
Public Contract Code § 7106**

TO BE EXECUTED BY SUBMITTER AND SUBMITTED WITH RFQ

The undersigned declares:

I am the Executive Vice President **[PRINT YOUR TITLE]**

of Lundgren Management Corporation **[PRINT FIRM NAME]**

The party making the foregoing Contract.

The RFQ is not made in the interest of, or on behalf of, any undisclosed person, partnership, company, association, organization, or corporation. The RFQ is genuine and not collusive or sham. The submitter has not directly or indirectly induced or solicited any other submitter to put in a false or sham RFQ. The submitter has not directly or indirectly colluded, conspired, connived, or agreed with any submitter or anyone else to put in a sham RFQ, or to refrain from submitting. The submitter has not in any manner, directly or indirectly, sought by agreement, communication, or conference with anyone to fix the RFQ price of the submitter or any other submitter, or to fix any overhead, profit, or cost element of the RFQ price, or of that of any other submitter. All statements contained in the RFQ are true. The submitter has not, directly or indirectly, submitted his or her RFQ price or any breakdown thereof, or the contents thereof, or divulged information or data relative thereto, to any corporation, partnership, company, association, organization, RFQ depository, or to any member or agent thereof, to effectuate a collusive or sham RFQ, and has not paid, and will not pay, any person or entity for such purpose.

Any person executing this declaration on behalf of a submitter that is a corporation, partnership, joint venture, limited liability company, limited liability partnership, or any other entity, hereby represents that he or she has full power to execute, and does execute, this declaration on behalf of the submitter.

I declare under penalty of perjury under the laws of the State of California that the foregoing is true and correct and that this declaration is executed on the following date:

Date: 2/19/21

Proper Name of Submitter: Margaret Lundgren / Lundgren Management Corporation

City, State: Valencia, CA

Signature: *Margaret Lundgren*

Print Name: Margaret Lundgren

Title: Executive Vice President

CONSTRUCTION MANAGEMENT SERVICES



Corporate Office
26330 Citrus Street
Valencia, CA 91355
T: 661.257.1805
F: 661.257.1806

Central Valley Regional Office
1712 19th Street, Suite 210A
Bakersfield, CA 93301
T: 661.324.4144
F: 661.257.1806

